EXHIBIT 19

Message

From: Ann Petrushka [petrushka@google.com]
Sent: 7/27/2020 9:05:00 PM
To: Stephen Yap [syap@google.com]
CC: Meghna Danton [meghnab@google.com]; APMG [ap-mg@google.com]; Scott Saiget [saiget@google.com]; Derek McCombs [mccombsd@google.com]; AGTM-Platforms [agtm-platforms@google.com]
Subject: Re: 7.27.20 APMG Agenda
Attachments: 1H 2020 PIR W8 - DSP Report Google_Downey_072720_Final (2).pptx

Hi all! Should you need to reference, please find attached the DSP Wave 8 Report (Powerpoint or PDF version available) that was presented at the July 20th APMG meeting (last Monday).

Thanks!

1H 2020 PIR W8 - DSP Report Google_Downey_07272...

On Mon, Jul 27, 2020 at 12:01 PM Stephen Yap <syap@google.com> wrote:
I will be 30 min late to the meeting

On Mon, Jul 27, 2020 at 12:01 PM Ann Petrushka <petrushka@google.com> wrote:
Fast follow: all will be in attendance except for the following folks who are on vacation:

STS
Matt T
Sean
Leo

Thanks!

On Mon, Jul 27, 2020 at 11:58 AM Meghna Danton <meghnab@google.com> wrote:

Hi Team, today's meeting agenda will have the following at go/APMG-weekly

- Top of mind topics (Sundar's note on WFH guidance, heads up on QBR timing, app+web migration)
- Finance Update (quota)
- Partners Pipeline update
- CPQ training for Sales Directors (rest can drop off!)

Thank you team,
Meghna
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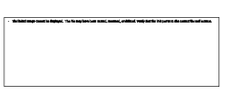

Meghna Danton

meghnab@google.com +1.917.691.1222

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Ann Petrushka

petrushka@google.com
630-290-1351

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syap@google.com **212.381.5329**
917.591.3372

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Ann Petrushka

petrushka@google.com

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DSP Report, Wave 8

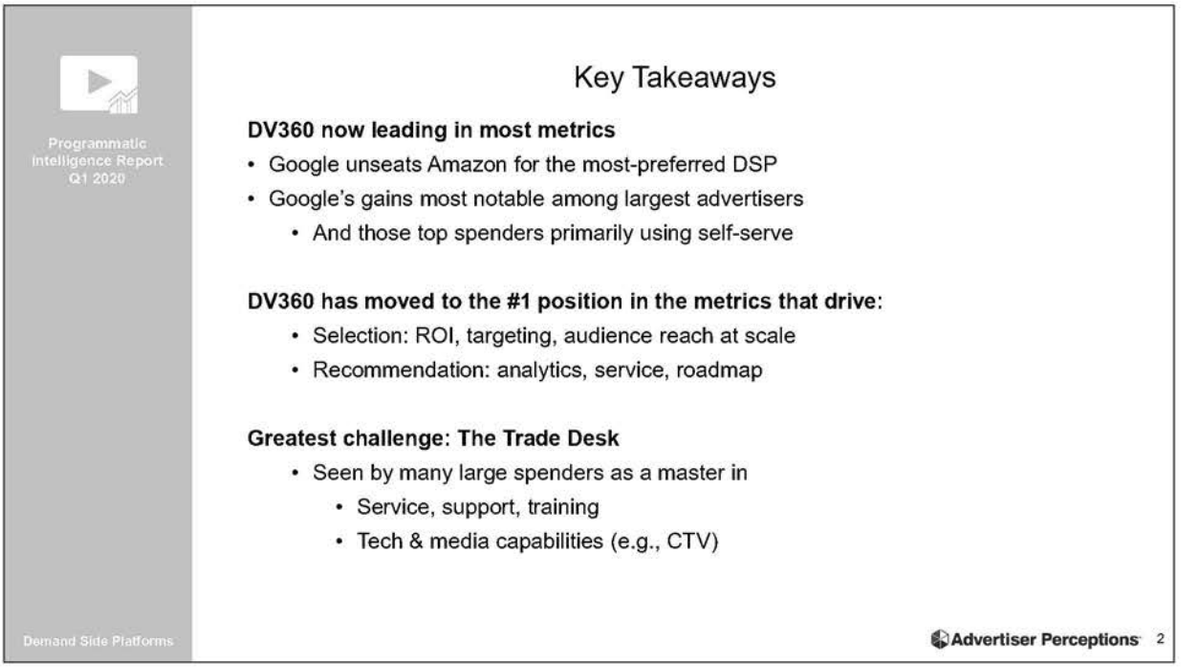
Part of the Programmatic Intelligence Report

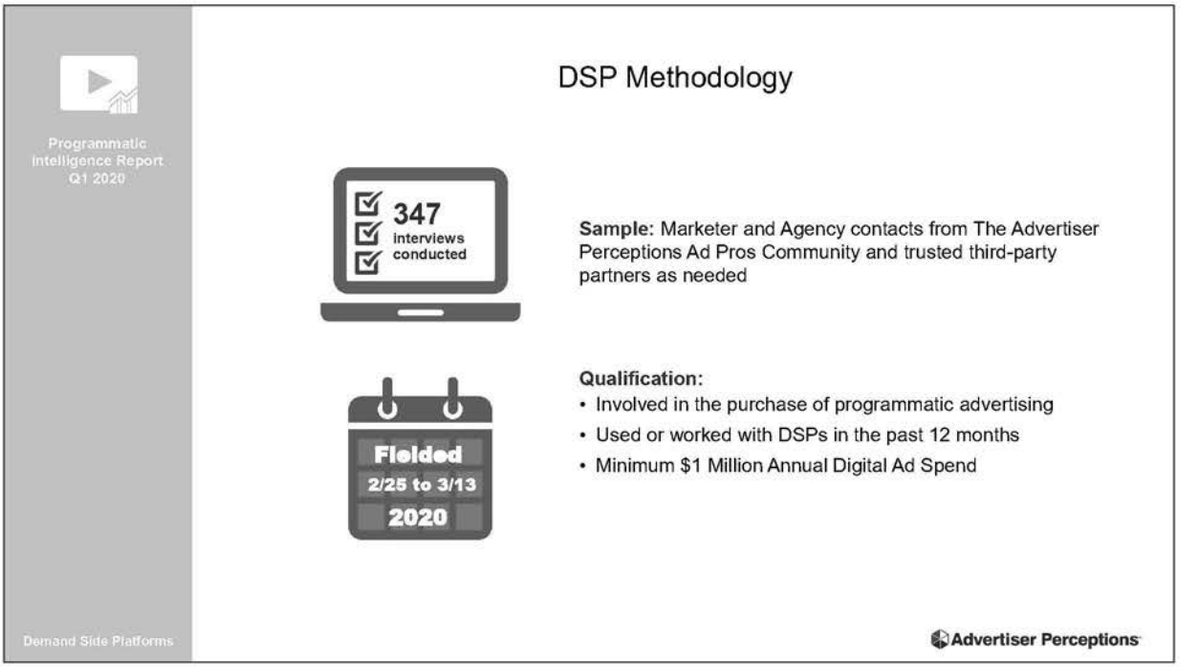
Q1 2020

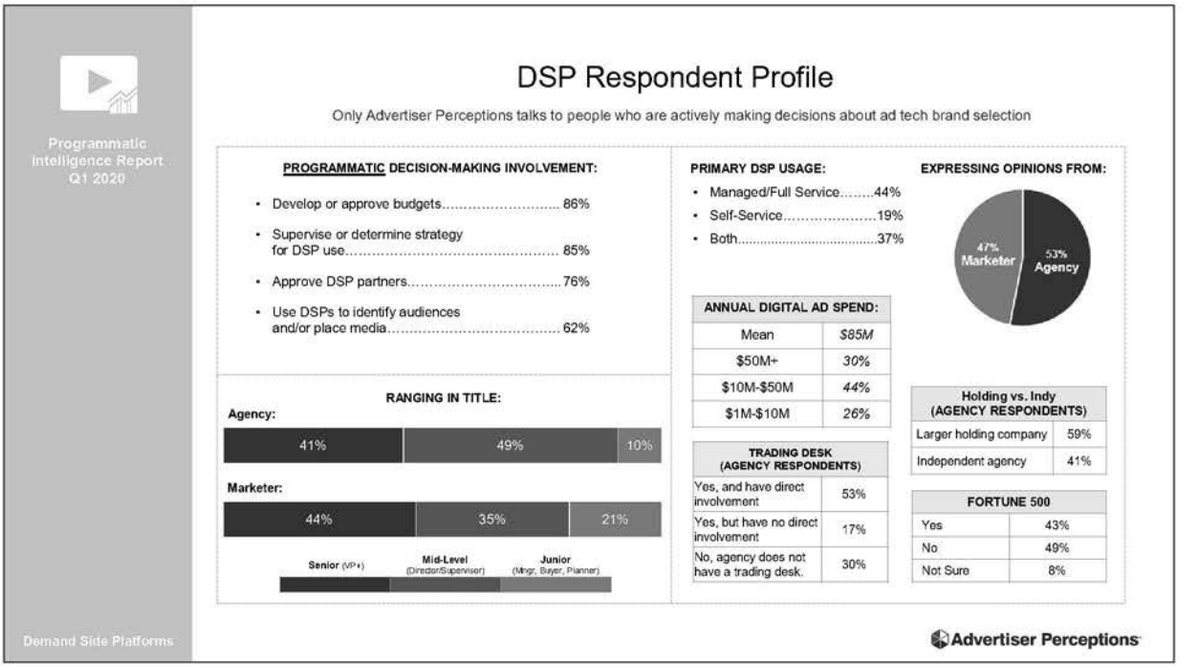
Advertiser Perceptions

What Advertisers Think™

The More You Know
The Stronger Your Brand
The More You'll Sell™


Programmatic
Intelligence Report
Q1 2020
Key Takeaways
DV360 now leading in most metrics
• Google unseats Amazon for the most-preferred DSP
• Google's gains most notable among largest advertisers
• And those top spenders primarily using self-serve
DV360 has moved to the #1 position in the metrics that drive:
• Selection: ROI, targeting, audience reach at scale
• Recommendation: analytics, service, roadmap
Greatest challenge: The Trade Desk
• Seen by many large spenders as a master in
• Service, support, training
• Tech & media capabilities (e.g., CTV)
Demand Side Platforms
Advertiser Perceptions
2

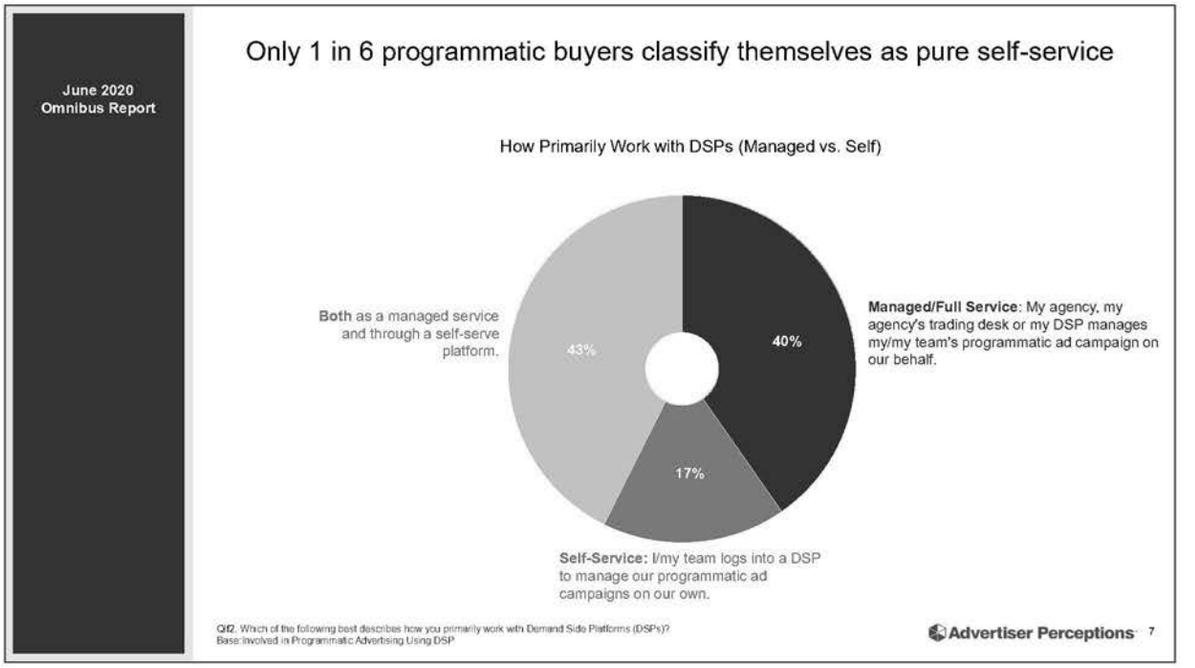

Programmatic Intelligence Report Q1 2020
DSP Methodology
347 interviews conducted
Sample: Marketer and Agency contacts from The Advertiser Perceptions Ad Pros Community and trusted third-party partners as needed
Fielded 2/25 to 3/13 2020
Qualification:
• Involved in the purchase of programmatic advertising
• Used or worked with DSPs in the past 12 months
• Minimum $1 Million Annual Digital Ad Spend
Demand Side Platforms
Advertiser Perceptions



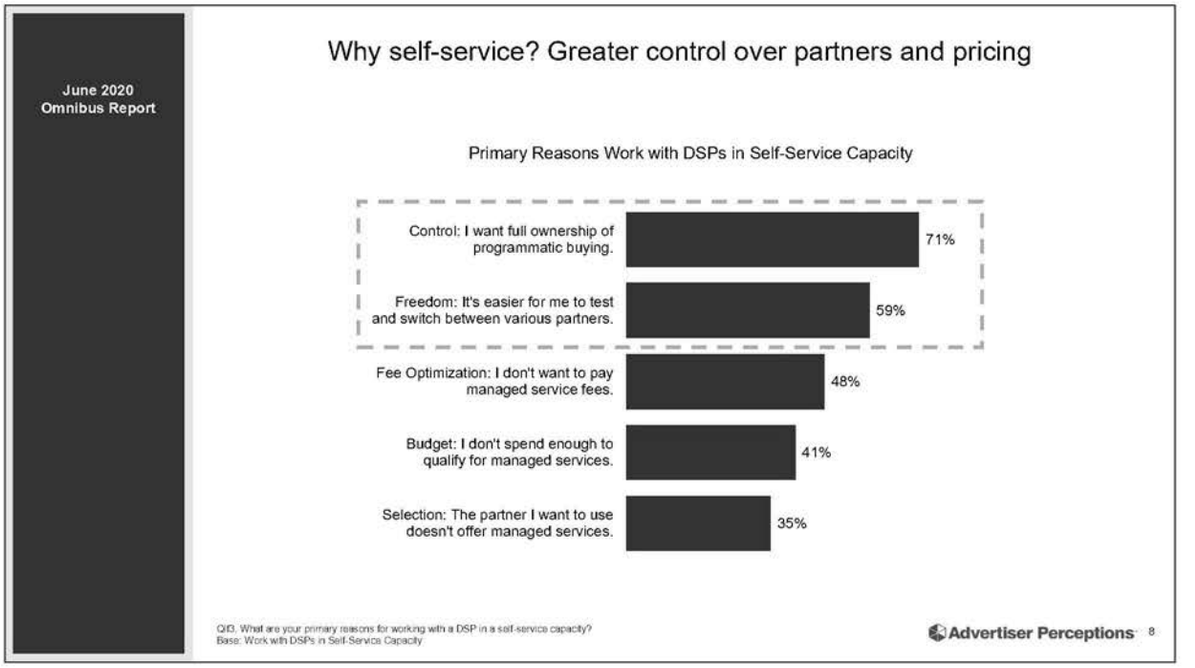
QDS7 (decision-making involvement); QS35 (agency/marketer); QS120M/QS120 (job title); QS25 (digital ad spend); QDS10 (primary DMP usage)
QS500N (Fortune 500)

Marketplace Overview:
Spotlight on Self-Serve
Advertiser Perceptions

Programmatic Intelligence Report Q1 2020
First, a few thoughts about self-serve
• Why don't marketers use self-serve all the time?
• Low trust in agency tech capabilities
• Low trust in agency motivations
• Limitations of incumbent contracted DSP
• Google's rises to #1 spot in self serve usage, intention, & preference
• Making significant wave-over-wave gains among self-serve buyers
• Reflected in highest ratings for performance & technology criteria with greatest impact on selection and recommendation
Demand Side Platforms
Advertiser Perceptions
8



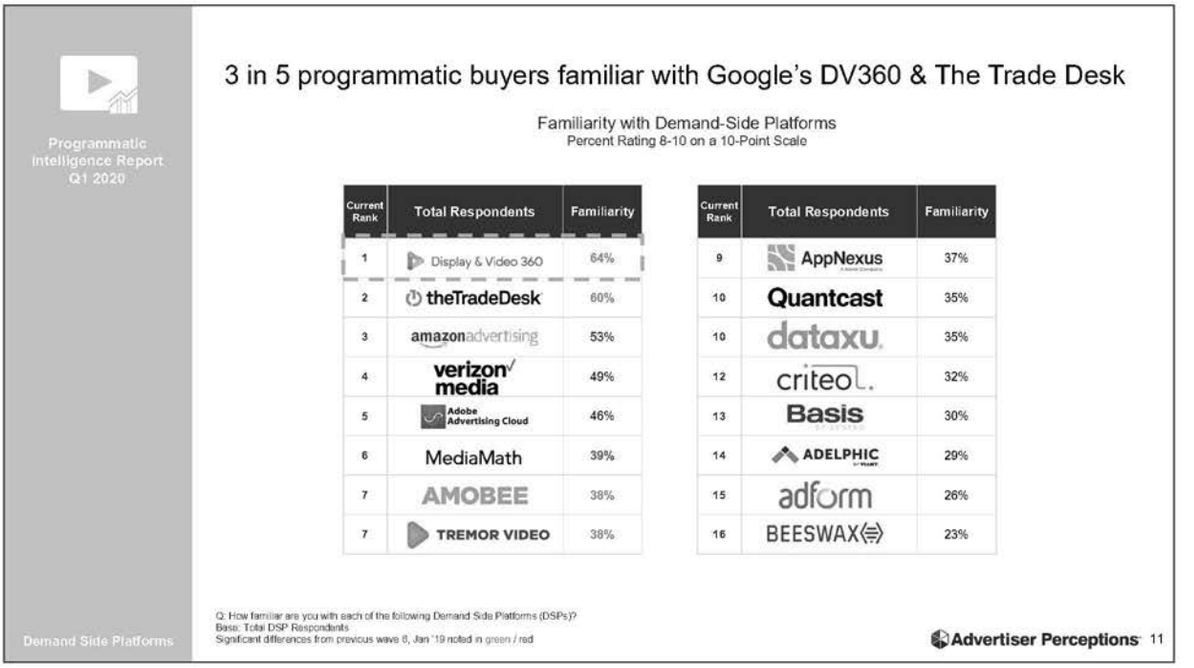
Internal – DSP Self Serve
Qlf2



Internal – DSP Self Serve
Qlf3

DSP funnel metrics
Advertiser Perceptions

Q206
2019SS103W7_Banner 1a_PIR W7 DSP Full Results_WT_Sep25.xlsx



Programmatic Intelligence Report Q1 2020

3 in 5 programmatic buyers familiar with Google's DV360 & The Trade Desk

Familiarity with Demand-Side Platforms
Percent Rating 8-10 on a 10-Point Scale

Current Rank	Total Respondents	Familiarity
1	Display & Video 360	64%
2	theTradeDesk	60%
3	amazonadvertising	53%
4	verizon media	49%
5	Adobe Advertising Cloud	46%
6	MediaMath	39%
7	AMOBEE	38%
7	TREMOR VIDEO	38%

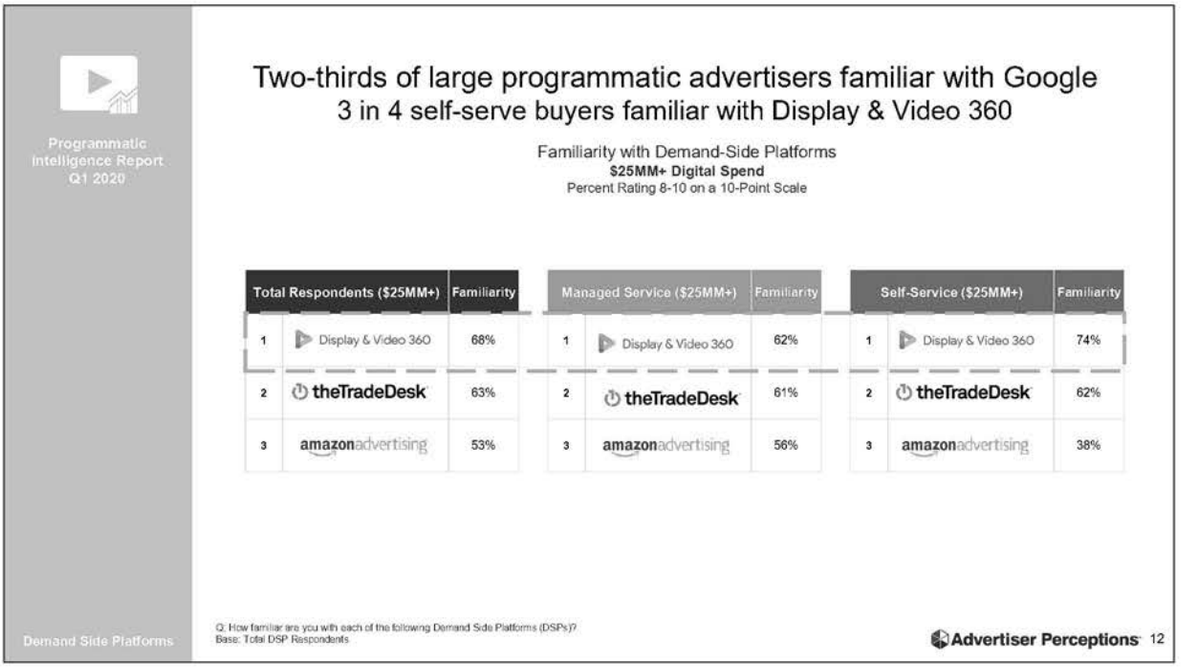
Current Rank	Total Respondents	Familiarity
9	AppNexus	37%
10	Quantcast	35%
10	dataxu	35%
12	criteo	32%
13	Basis	30%
14	ADELPHIC	29%
15	adform	26%
16	BEESWAX	23%

Q: How familiar are you with each of the following Demand Side Platforms (DSPs)?
Base: Total DSP Respondents
Significant differences from previous wave 8, Jan '19 noted in green / red

Demand Side Platforms

Advertiser Perceptions 11

Q210 Familiarity



Programmatic Intelligence Report Q1 2020

Two-thirds of large programmatic advertisers familiar with Google
3 in 4 self-serve buyers familiar with Display & Video 360

Familiarity with Demand-Side Platforms
$25MM+ Digital Spend
Percent Rating 8-10 on a 10-Point Scale

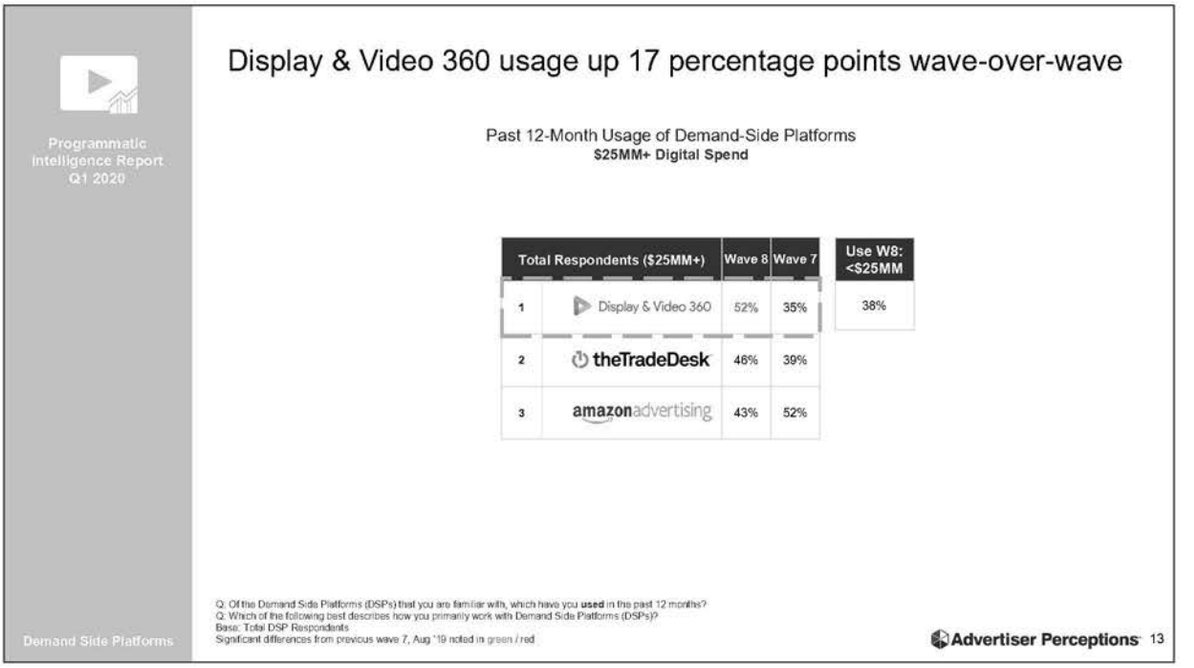
	Total Respondents ($25MM+)	Familiarity		Managed Service ($25MM+)	Familiarity		Self-Service ($25MM+)	Familiarity
1	Display & Video 360	68%	1	Display & Video 360	62%	1	Display & Video 360	74%
2	theTradeDesk	63%	2	theTradeDesk	61%	2	theTradeDesk	62%
3	amazonadvertising	53%	3	amazonadvertising	56%	3	amazonadvertising	38%

Demand Side Platforms

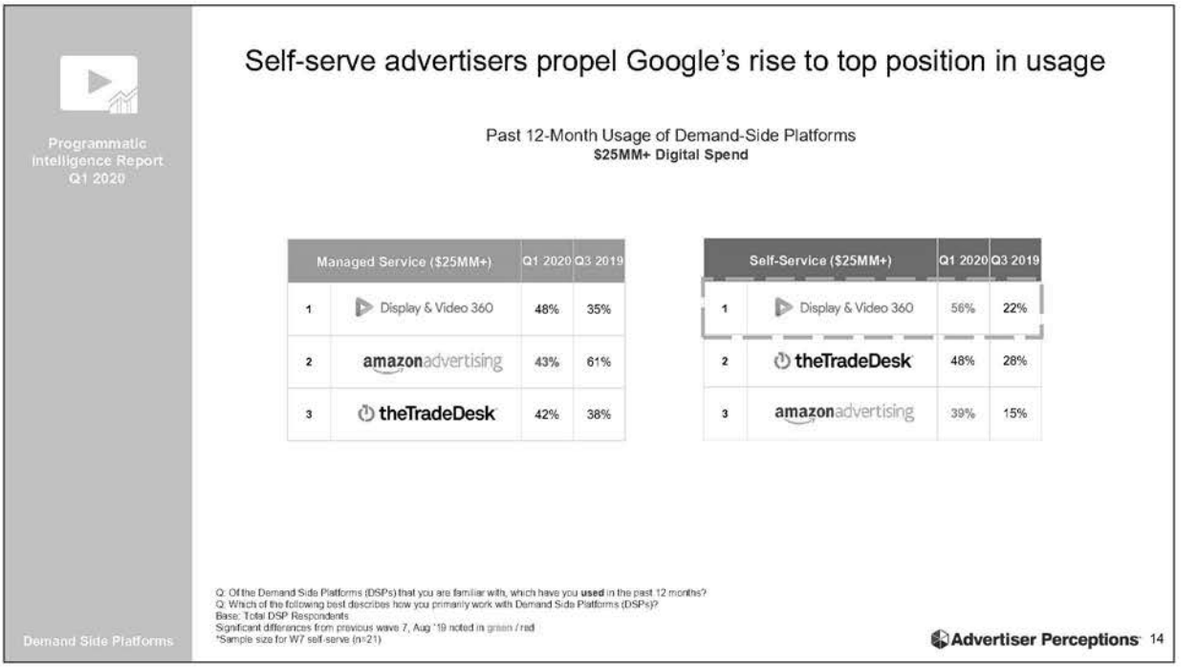
Q. How familiar are you with each of the following Demand Side Platforms (DSPs)?
Base: Total DSP Respondents

Advertiser Perceptions 12

Q210 Familiarity


Programmatic Intelligence Report Q1 2020
Display & Video 360 usage up 17 percentage points wave-over-wave
Past 12-Month Usage of Demand-Side Platforms
$25MM+ Digital Spend
Total Respondents ($25MM+)
Wave 8
Wave 7
Use W8: <$25MM
1 Display & Video 360 52% 35% 38%
2 theTradeDesk 46% 39%
3 amazonadvertising 43% 52%
Q: Of the Demand Side Platforms (DSPs) that you are familiar with, which have you used in the past 12 months?
Q: Which of the following best describes how you primarily work with Demand Side Platforms (DSPs)?
Base: Total DSP Respondents
Significant differences from previous wave 7, Aug '19 noted in green / red
Demand Side Platforms
Advertiser Perceptions 13

Q215 Usage



Programmatic Intelligence Report Q1 2020

Self-serve advertisers propel Google's rise to top position in usage

Past 12-Month Usage of Demand-Side Platforms
$25MM+ Digital Spend

	Managed Service ($25MM+)	Q1 2020	Q3 2019
1	Display & Video 360	48%	35%
2	amazonadvertising	43%	61%
3	theTradeDesk	42%	38%

	Self-Service ($25MM+)	Q1 2020	Q3 2019
1	Display & Video 360	56%	22%
2	theTradeDesk	48%	28%
3	amazonadvertising	39%	15%

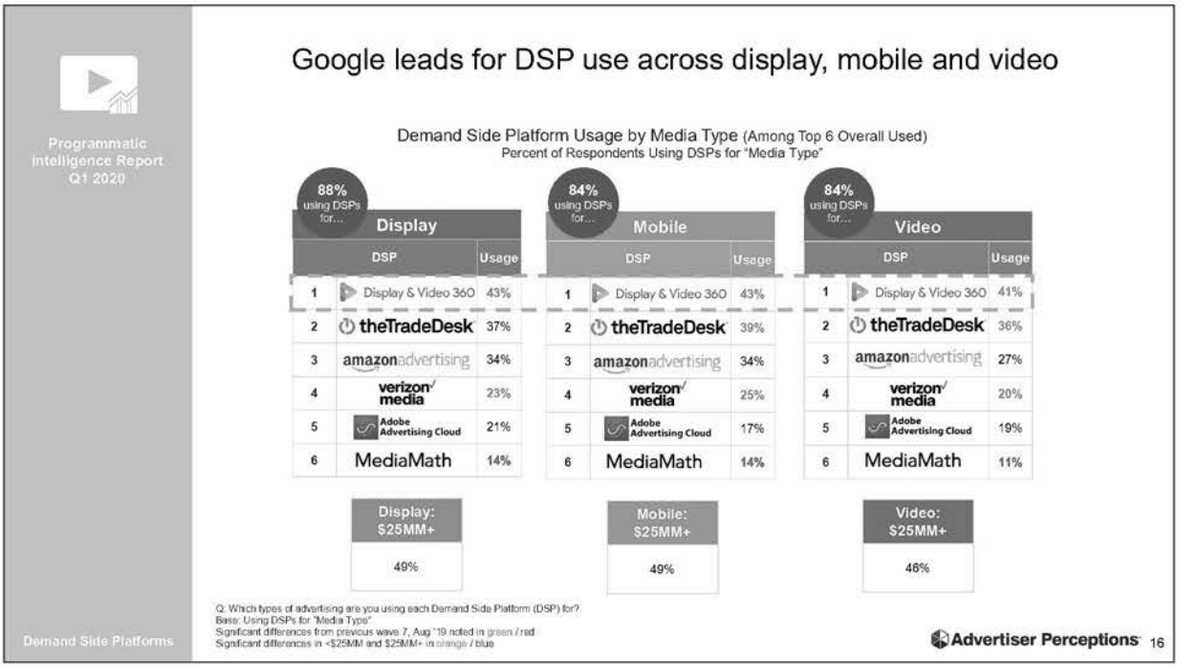
Q: Of the Demand Side Platforms (DSPs) that you are familiar with, which have you **used** in the past 12 months?
Q: Which of the following best describes how you primarily work with Demand Side Platforms (DSPs)?
Base: Total DSP Respondents
Significant differences from previous wave 7, Aug '19 noted in green / red
*Sample size for W7 self-serve (n=21)

Demand Side Platforms

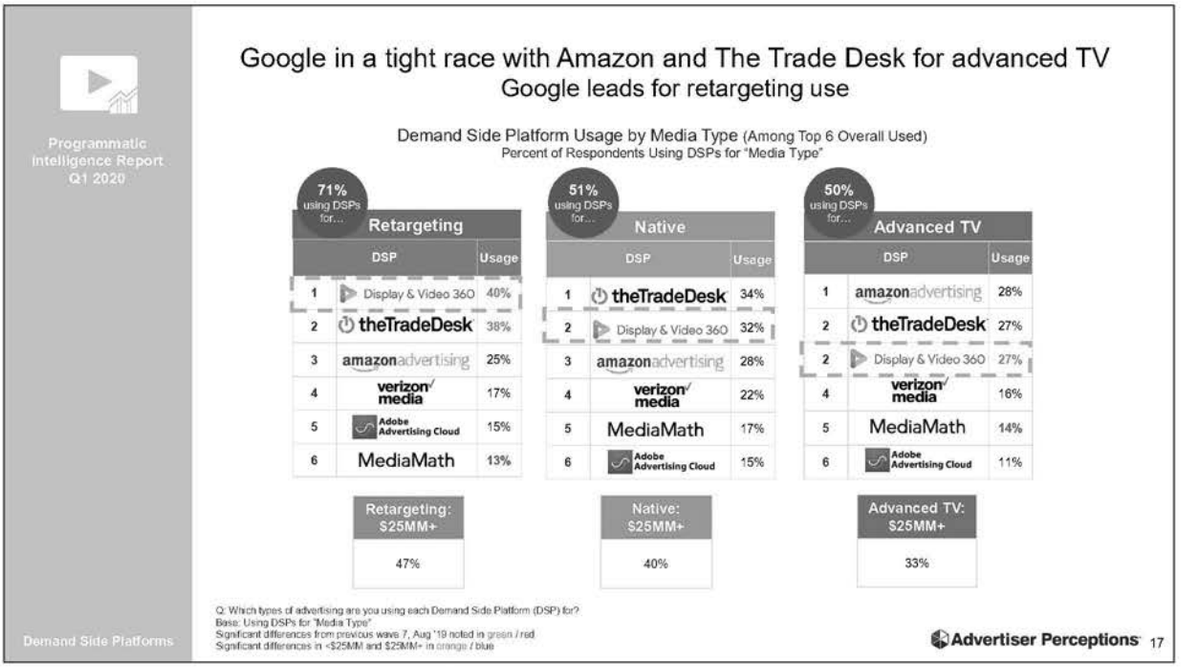
Advertiser Perceptions 14

Q215 Usage

Q215 Usage
S80b Amazon


Programmatic Intelligence Report Q1 2020
Google leads for DSP use across display, mobile and video
Demand Side Platform Usage by Media Type (Among Top 6 Overall Used)
Percent of Respondents Using DSPs for "Media Type"
88% using DSPs for... Display
DSP Usage
1 Display & Video 360 43%
2 theTradeDesk 37%
3 amazonadvertising 34%
4 verizon media 23%
5 Adobe Advertising Cloud 21%
6 MediaMath 14%
84% using DSPs for... Mobile
DSP Usage
1 Display & Video 360 43%
2 theTradeDesk 39%
3 amazonadvertising 34%
4 verizon media 25%
5 Adobe Advertising Cloud 17%
6 MediaMath 14%
84% using DSPs for... Video
DSP Usage
1 Display & Video 360 41%
2 theTradeDesk 36%
3 amazonadvertising 27%
4 verizon media 20%
5 Adobe Advertising Cloud 19%
6 MediaMath 11%
Display: $25MM+ 49%
Mobile: $25MM+ 49%
Video: $25MM+ 46%
Q. Which types of advertising are you using each Demand Side Platform (DSP) for?
Base: Using DSPs for "Media Type"
Significant differences from previous wave 7, Aug '19 noted in green / red
Significant differences in <$25MM and $25MM+ in orange / blue
Demand Side Platforms
Advertiser Perceptions 16

Q232



Programmatic Intelligence Report Q1 2020

Google in a tight race with Amazon and The Trade Desk for advanced TV
Google leads for retargeting use

Demand Side Platform Usage by Media Type (Among Top 6 Overall Used)
Percent of Respondents Using DSPs for "Media Type"

71% using DSPs for... Retargeting

	DSP	Usage
1	Display & Video 360	40%
2	theTradeDesk	38%
3	amazonadvertising	25%
4	verizon media	17%
5	Adobe Advertising Cloud	15%
6	MediaMath	13%

Retargeting: $25MM+ — 47%

51% using DSPs for... Native

	DSP	Usage
1	theTradeDesk	34%
2	Display & Video 360	32%
3	amazonadvertising	28%
4	verizon media	22%
5	MediaMath	17%
6	Adobe Advertising Cloud	15%

Native: $25MM+ — 40%

50% using DSPs for... Advanced TV

	DSP	Usage
1	amazonadvertising	28%
2	theTradeDesk	27%
2	Display & Video 360	27%
4	verizon media	16%
5	MediaMath	14%
6	Adobe Advertising Cloud	11%

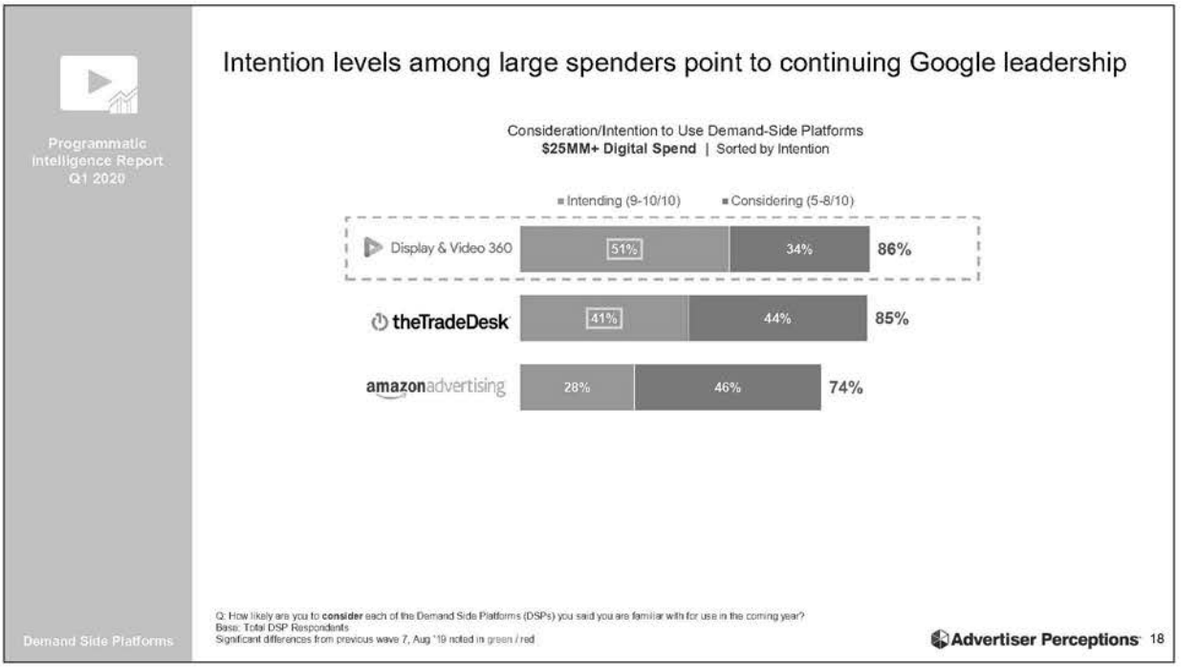
Advanced TV: $25MM+ — 33%

Q: Which types of advertising are you using each Demand Side Platform (DSP) for?
Base: Using DSPs for "Media Type"
Significant differences from previous wave 7, Aug '19 noted in green / red
Significant differences in <$25MM and $25MM+ in orange / blue

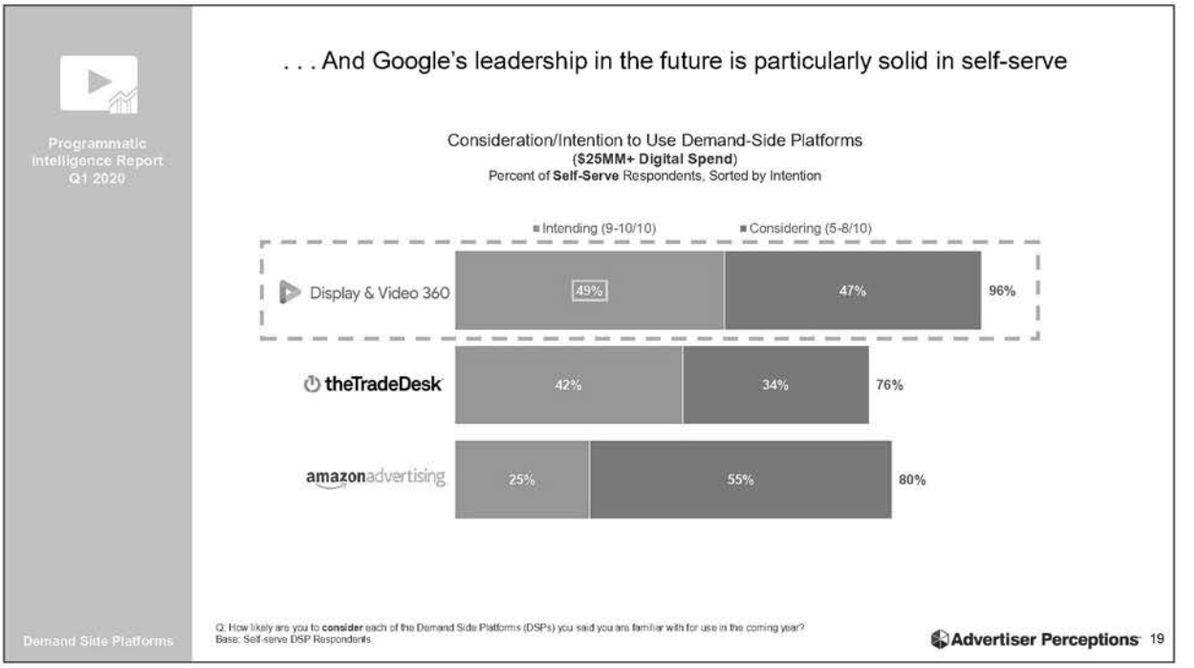
Demand Side Platforms

Advertiser Perceptions 17

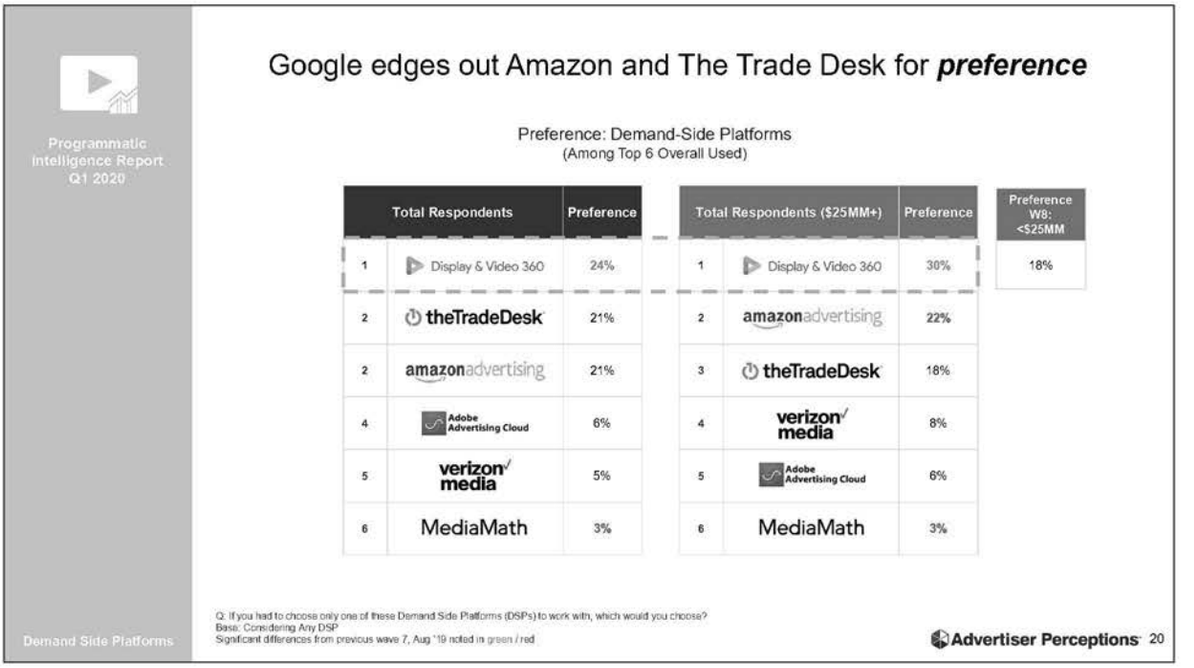
Q232



Q220 Consideration/Intention



Q220 Consideration/Intention



Programmatic Intelligence Report Q1 2020

Google edges out Amazon and The Trade Desk for ***preference***

Preference: Demand-Side Platforms
(Among Top 6 Overall Used)

	Total Respondents	Preference
1	Display & Video 360	24%
2	theTradeDesk	21%
2	amazonadvertising	21%
4	Adobe Advertising Cloud	6%
5	verizon media	5%
6	MediaMath	3%

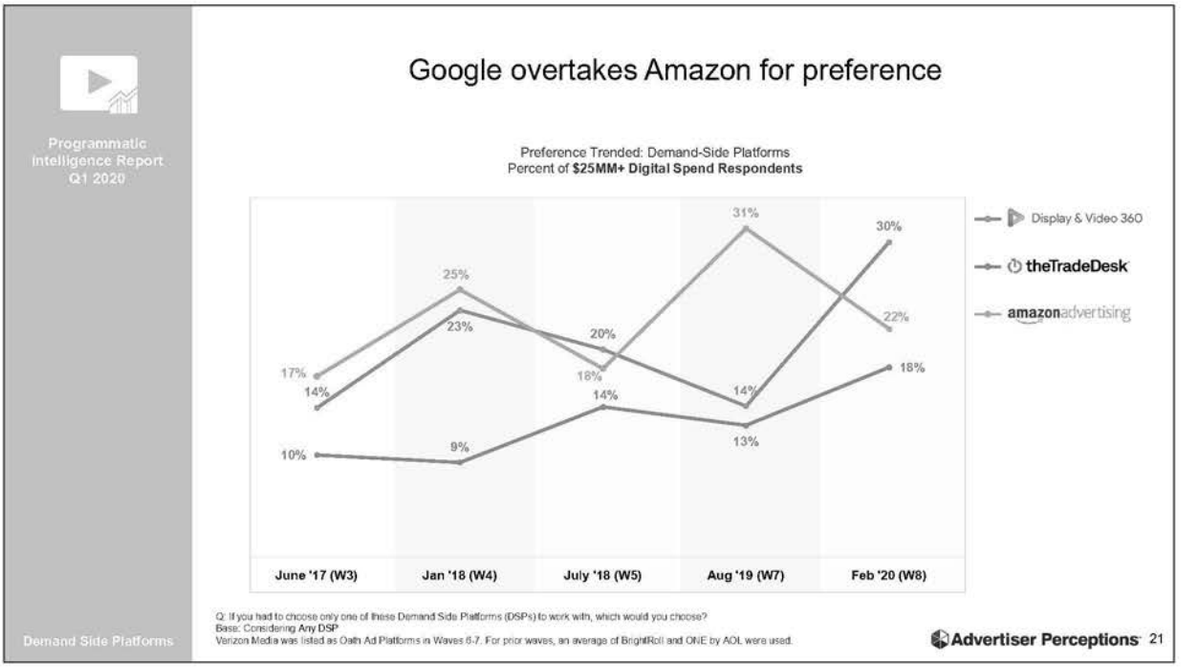
	Total Respondents ($25MM+)	Preference	Preference W8: <$25MM
1	Display & Video 360	30%	18%
2	amazonadvertising	22%	
3	theTradeDesk	18%	
4	verizon media	8%	
5	Adobe Advertising Cloud	6%	
6	MediaMath	3%	

Q: If you had to choose only one of these Demand Side Platforms (DSPs) to work with, which would you choose?
Base: Considering Any DSP
Significant differences from previous wave 7, Aug '19 noted in green / red

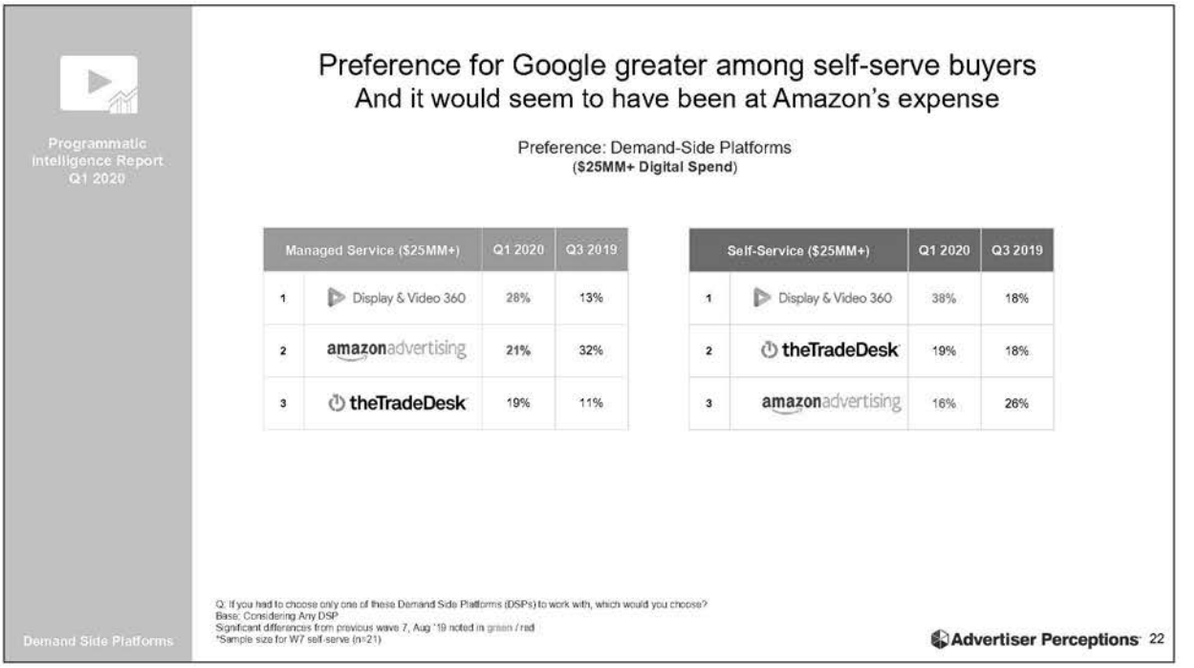
Demand Side Platforms

Advertiser Perceptions 20

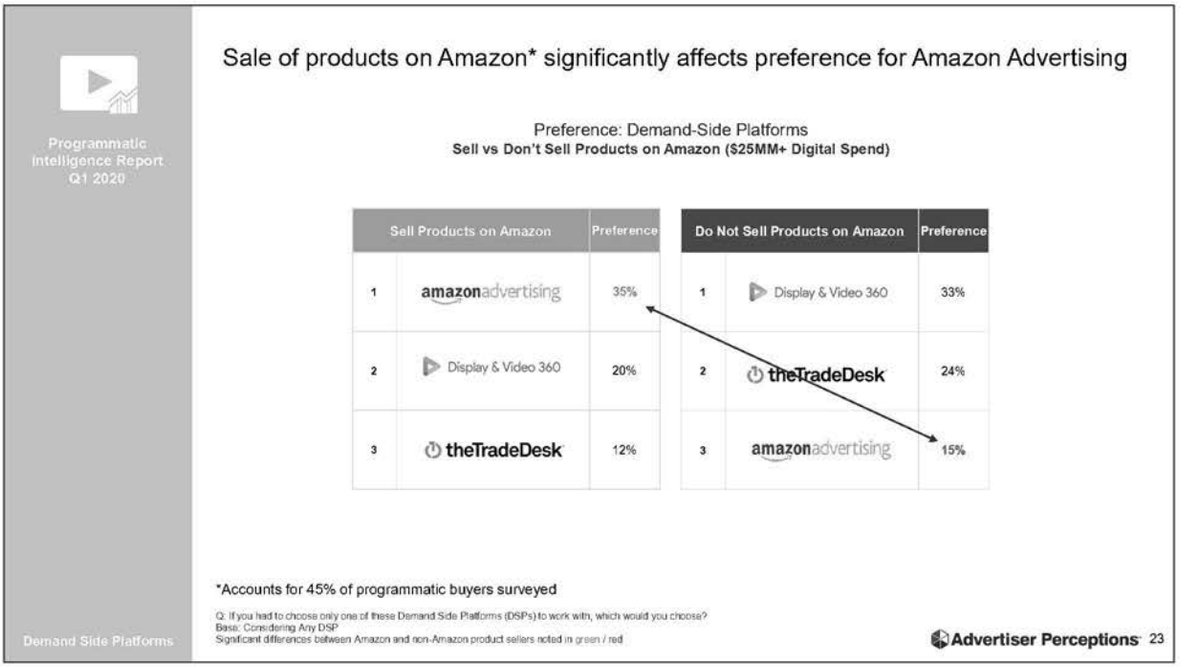
Q226 Preference
Note: using "Considering any DSP" version in tables.


Programmatic Intelligence Report Q1 2020
Google overtakes Amazon for preference
Preference Trended: Demand-Side Platforms
Percent of $25MM+ Digital Spend Respondents
Display & Video 360
theTradeDesk
amazonadvertising
17%
14%
25%
23%
20%
18%
31%
14%
30%
22%
10%
9%
14%
13%
18%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Aug '19 (W7)
Feb '20 (W8)
Q: If you had to choose only one of these Demand Side Platforms (DSPs) to work with, which would you choose?
Base: Considering Any DSP
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions
21

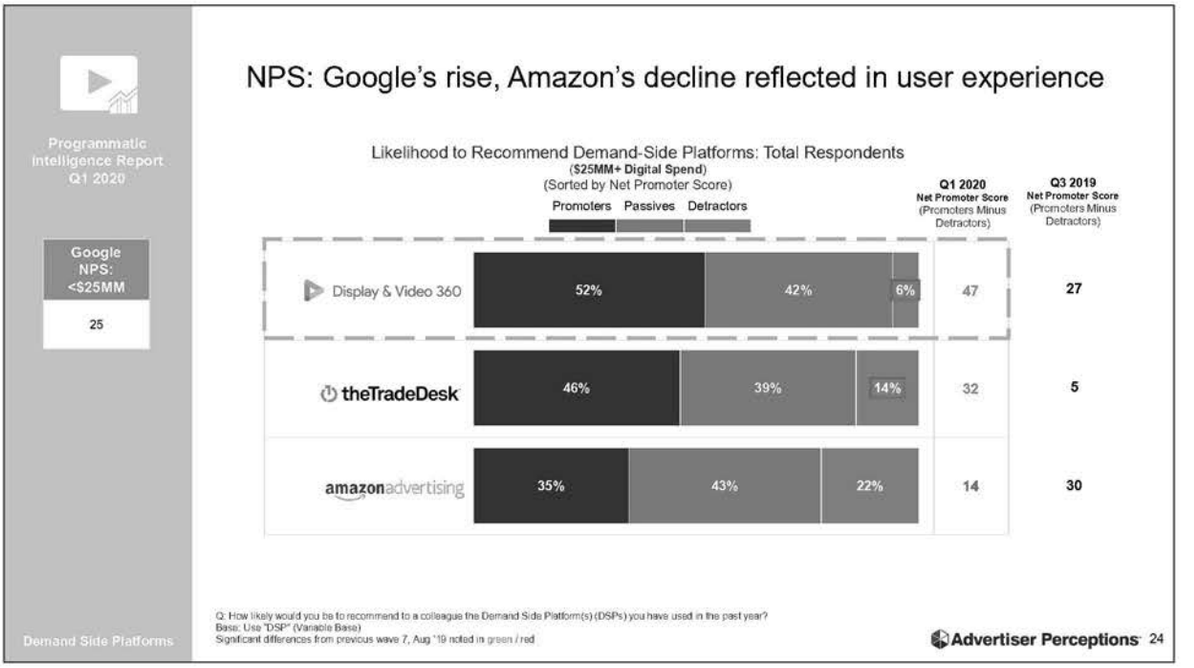
Q220



Q226 Preference
Note: using "Considering any DSP" version in tables.



Q226 Preference
Note: using "Considering any DSP" version in tables.



Q230 NPS
Wave 7 breakdown: Promoters (43) Passive (42) Detractors (15)

Programmatic Intelligence Report Q1 2020

NPS for Amazon shows little change for larger advertisers regardless of the sale of products on Amazon*

Likelihood to Recommend Demand-Side Platforms
Sell vs Don't Sell Products on Amazon ($25MM+ Digital Spend)
(Sorted by Net Promoter Score)

	Sell Products on Amazon ($25MM+)	NPS
1	Display & Video 360	48
2	theTradeDesk	39
3	amazonadvertising	26

	Do Not Sell Products on Amazon ($25MM+)	NPS
1	Display & Video 360	58
2	theTradeDesk	37
3	amazonadvertising	24

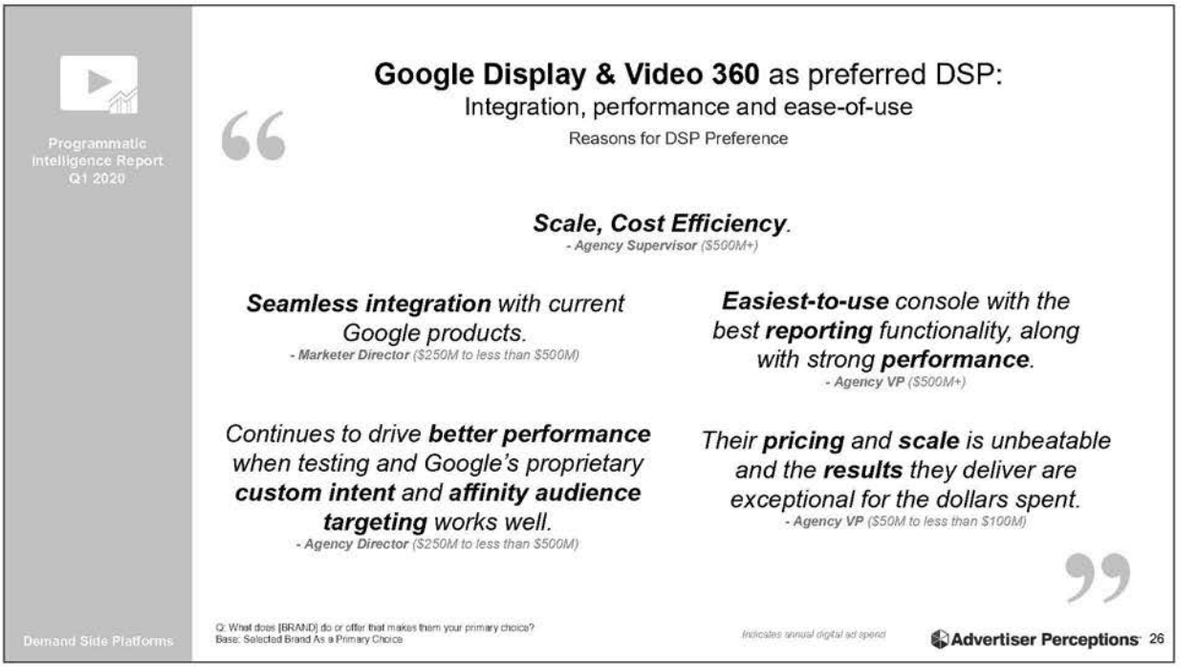
*Accounts for 45% of programmatic buyers surveyed

Q. How likely would you be to recommend to a colleague the Demand Side Platform(s) (DSPs) you have used in the past year?
Base: Use "DSP" (Variable Base)

Demand Side Platforms

Advertiser Perceptions 25

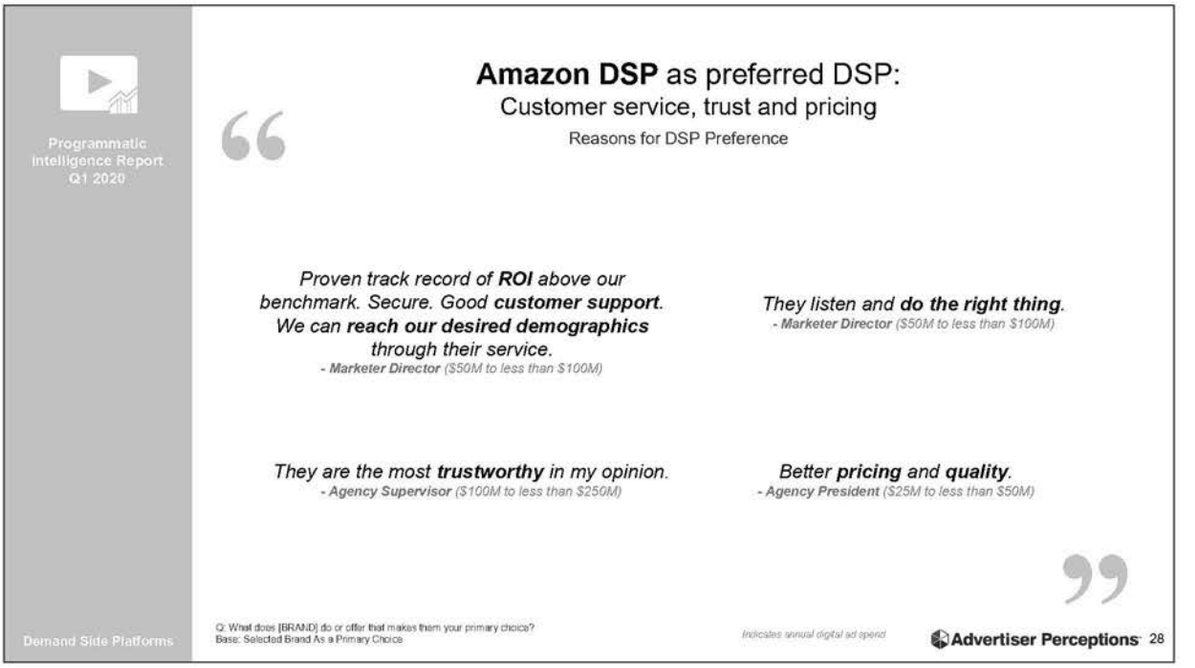
Q230 NPS


Programmatic Intelligence Report Q1 2020
Google Display & Video 360 as preferred DSP:
Integration, performance and ease-of-use
Reasons for DSP Preference
Scale, Cost Efficiency.
- Agency Supervisor ($500M+)
Seamless integration with current Google products.
- Marketer Director ($250M to less than $500M)
Easiest-to-use console with the best reporting functionality, along with strong performance.
- Agency VP ($500M+)
Continues to drive better performance when testing and Google's proprietary custom intent and affinity audience targeting works well.
- Agency Director ($250M to less than $500M)
Their pricing and scale is unbeatable and the results they deliver are exceptional for the dollars spent.
- Agency VP ($50M to less than $100M)
Demand Side Platforms
Q: What does [BRAND] do or offer that makes them your primary choice?
Base: Selected Brand As a Primary Choice
Indicates annual digital ad spend
Advertiser Perceptions 26

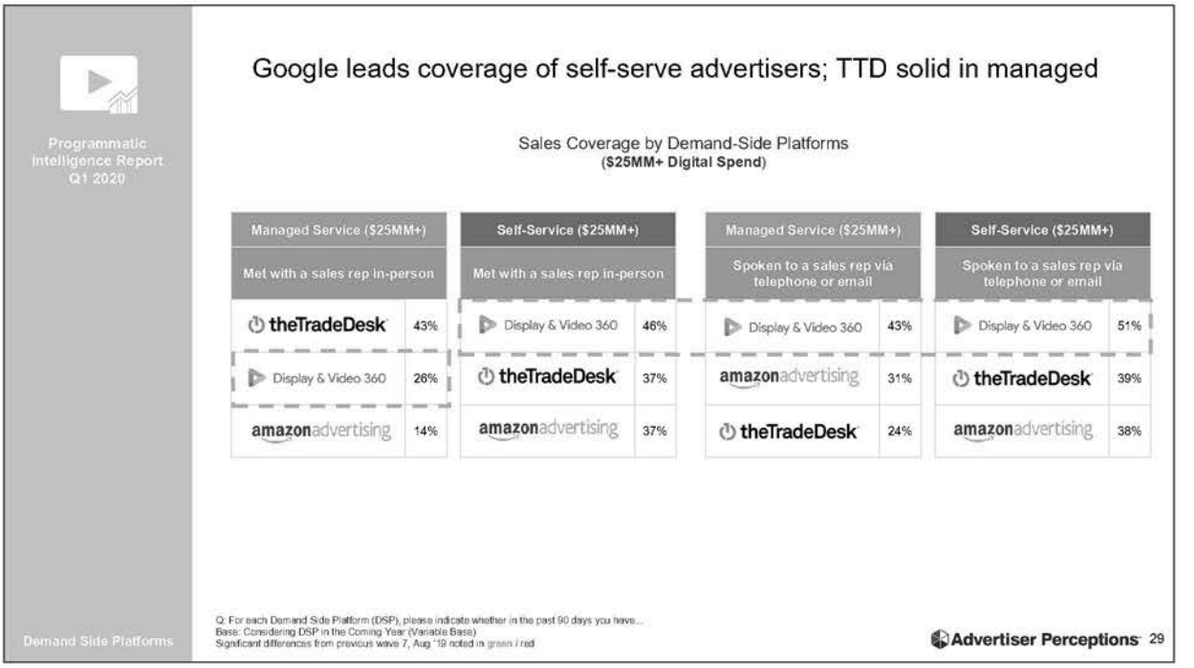
Q226a.

Programmatic Intelligence Report Q1 2020
The Trade Desk DSP as preferred DSP:
Customer service, breadth of inventory, trust, technology and transparency
Reasons for DSP Preference
They have more transparent pricing and provide more accurate measurement.
- Agency Director ($25M to less than $50M)
Largest range of programmatic media channels offered (and most of them strong).
- Marketer C-level ($50M to less than $100M)
Customer service, ease of use, quality results.
- Agency Supervisor ($25M to less than $50M)
A whole lot of support channels to help ease the ad experience during the entire process.
- Agency Director ($100M to less than $250M)
Has come on as a leader with strong expertise. They've added a lot of video multiscreen options, whether it's addressable or OTT. They continue to break barriers in terms of expanding and growing themselves.
- Marketing Director ($50M to less than $100M)
Superior account team.
- Agency Supervisor ($25M to less than $50M)
Demand Side Platforms
Q: What does [BRAND] do or offer that makes them your primary choice?
Base: Selected Brand As a Primary Choice
Indicates annual digital ad spend
Advertiser Perceptions 27

Q226a.

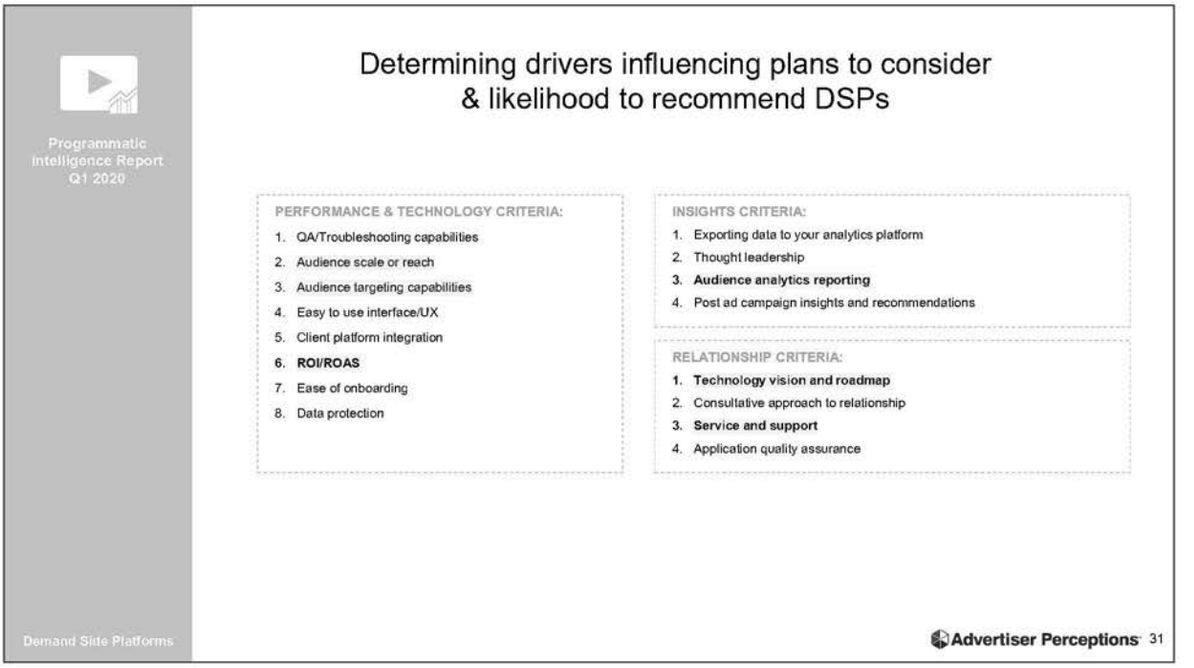

Programmatic Intelligence Report Q1 2020
Amazon DSP as preferred DSP:
Customer service, trust and pricing
Reasons for DSP Preference
Proven track record of ROI above our benchmark. Secure. Good customer support. We can reach our desired demographics through their service.
- Marketer Director ($50M to less than $100M)
They listen and do the right thing.
- Marketer Director ($50M to less than $100M)
They are the most trustworthy in my opinion.
- Agency Supervisor ($100M to less than $250M)
Better pricing and quality.
- Agency President ($25M to less than $50M)
Q: What does [BRAND] do or offer that makes them your primary choice?
Base: Selected Brand As a Primary Choice
Indicates annual digital ad spend
Demand Side Platforms
Advertiser Perceptions
28

Q226a.

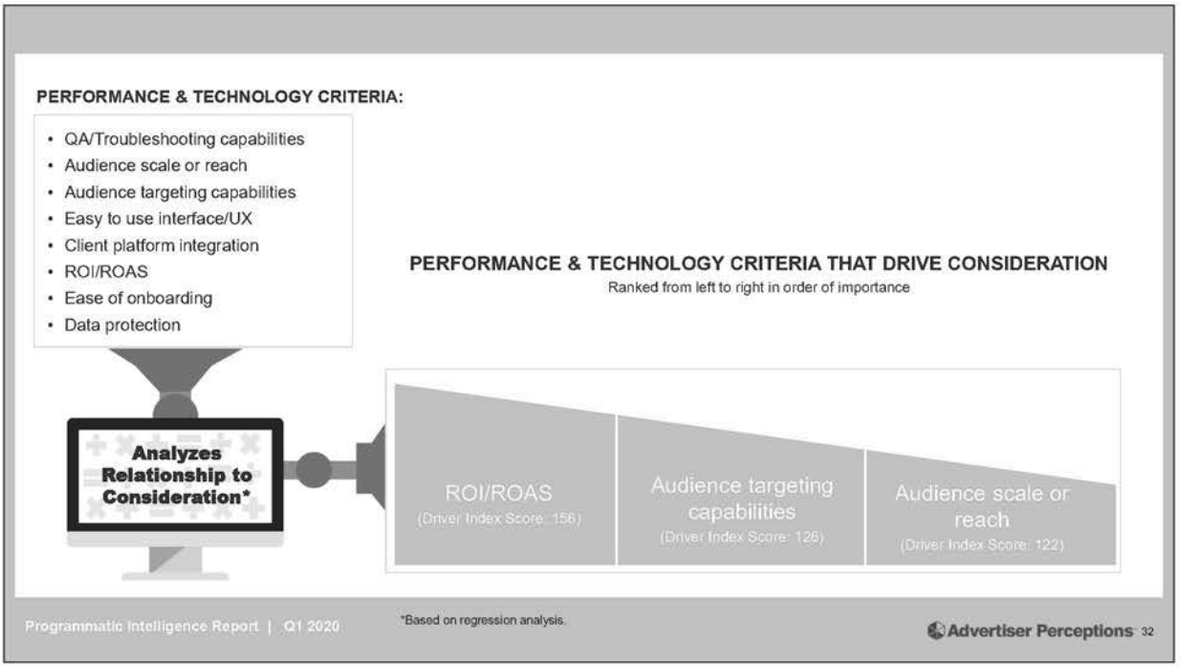


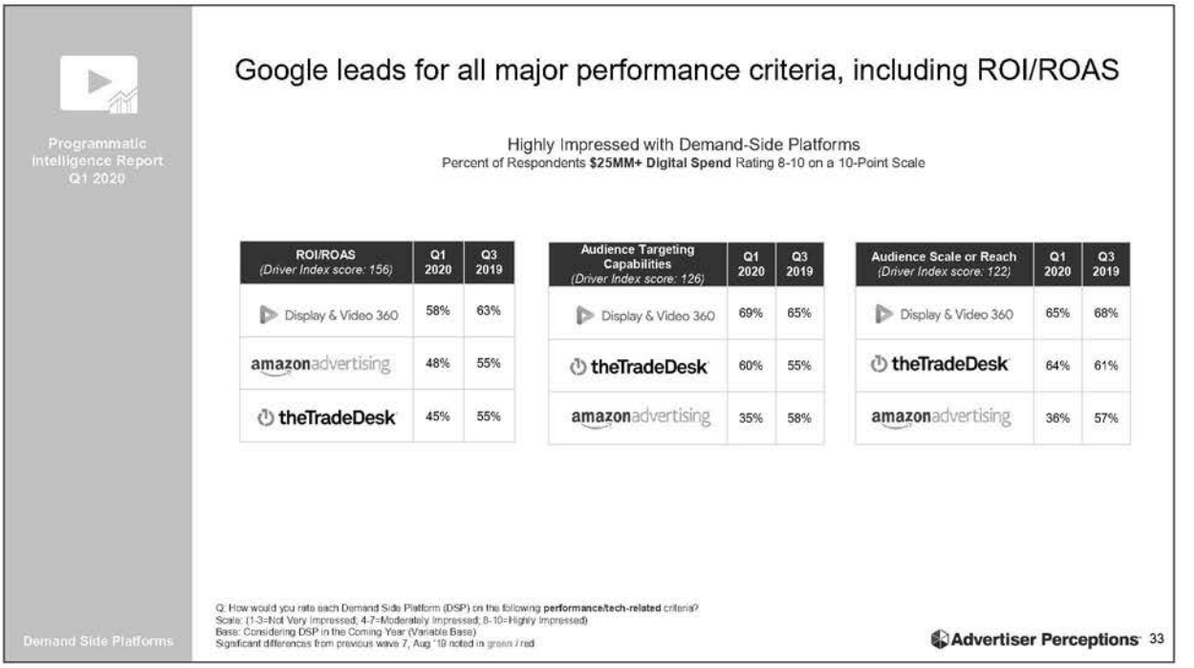
Q250 Sales coverage

Selection & recommendation drivers, with ratings of DSPs
Advertiser Perceptions

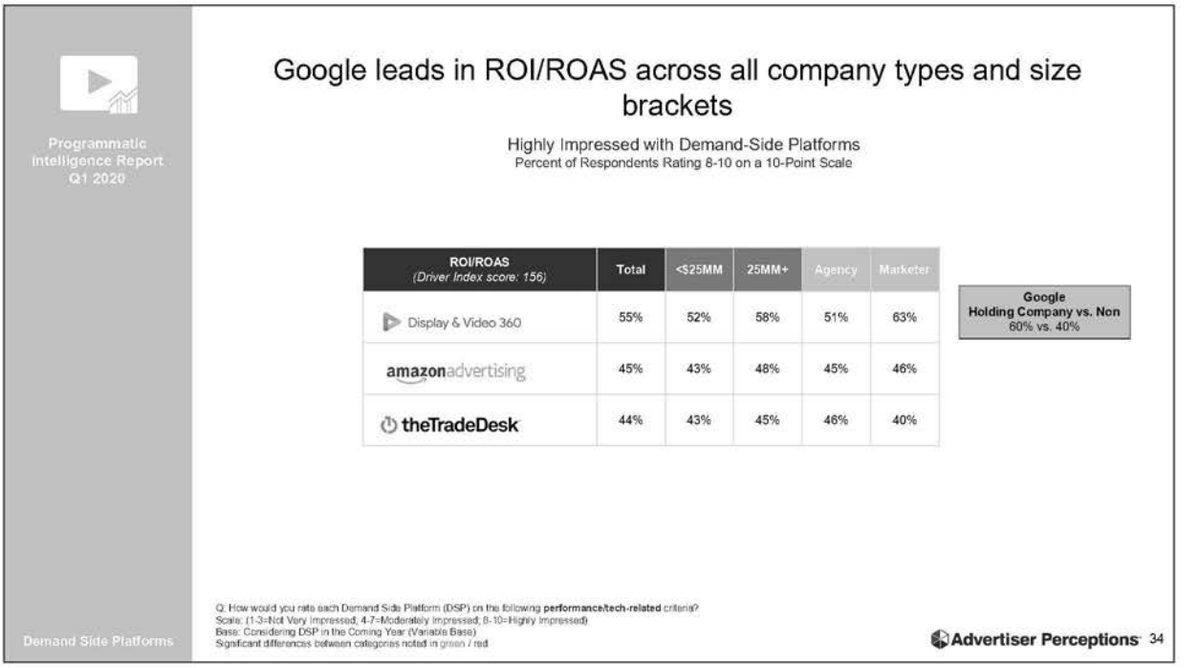


Q235, Q240, Q245


PERFORMANCE & TECHNOLOGY CRITERIA:
• QA/Troubleshooting capabilities
• Audience scale or reach
• Audience targeting capabilities
• Easy to use interface/UX
• Client platform integration
• ROI/ROAS
• Ease of onboarding
• Data protection
Analyzes Relationship to Consideration*
PERFORMANCE & TECHNOLOGY CRITERIA THAT DRIVE CONSIDERATION
Ranked from left to right in order of importance
ROI/ROAS
(Driver Index Score: 156)
Audience targeting capabilities
(Driver Index Score: 126)
Audience scale or reach
(Driver Index Score: 122)
Programmatic Intelligence Report | Q1 2020
*Based on regression analysis.
Advertiser Perceptions 32



Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Google leads in ROI/ROAS across all company types and size brackets

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

ROI/ROAS *(Driver Index score: 156)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	55%	52%	58%	51%	63%
amazonadvertising	45%	43%	48%	45%	46%
theTradeDesk	44%	43%	45%	46%	40%

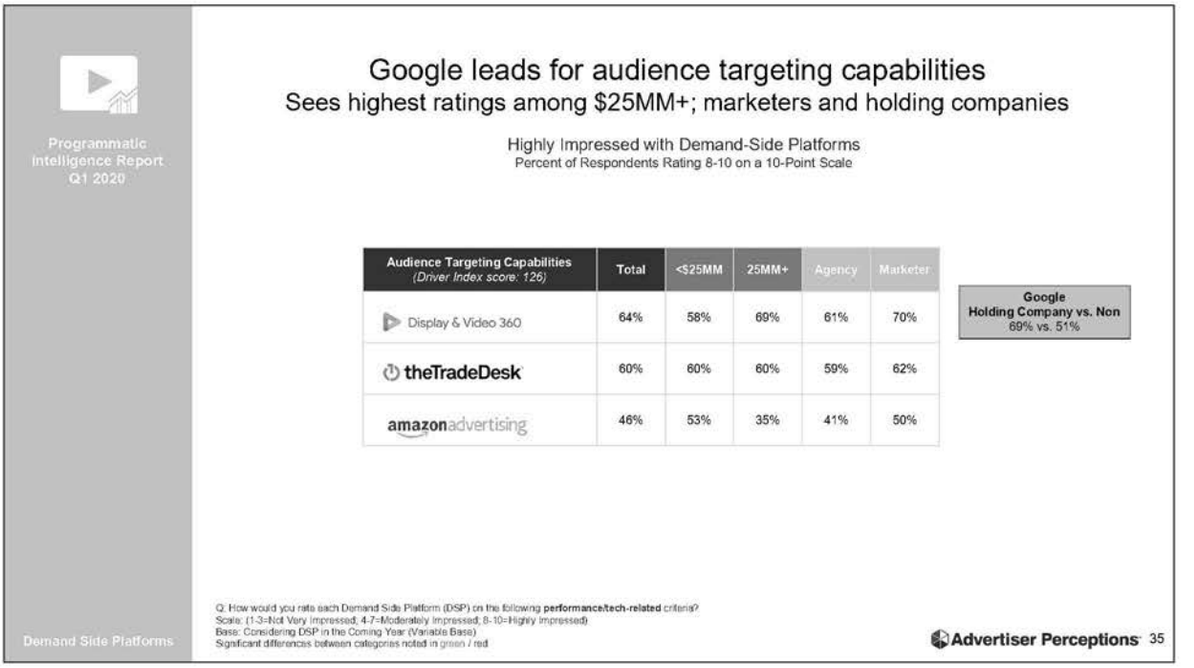
Google Holding Company vs. Non
60% vs. 40%

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

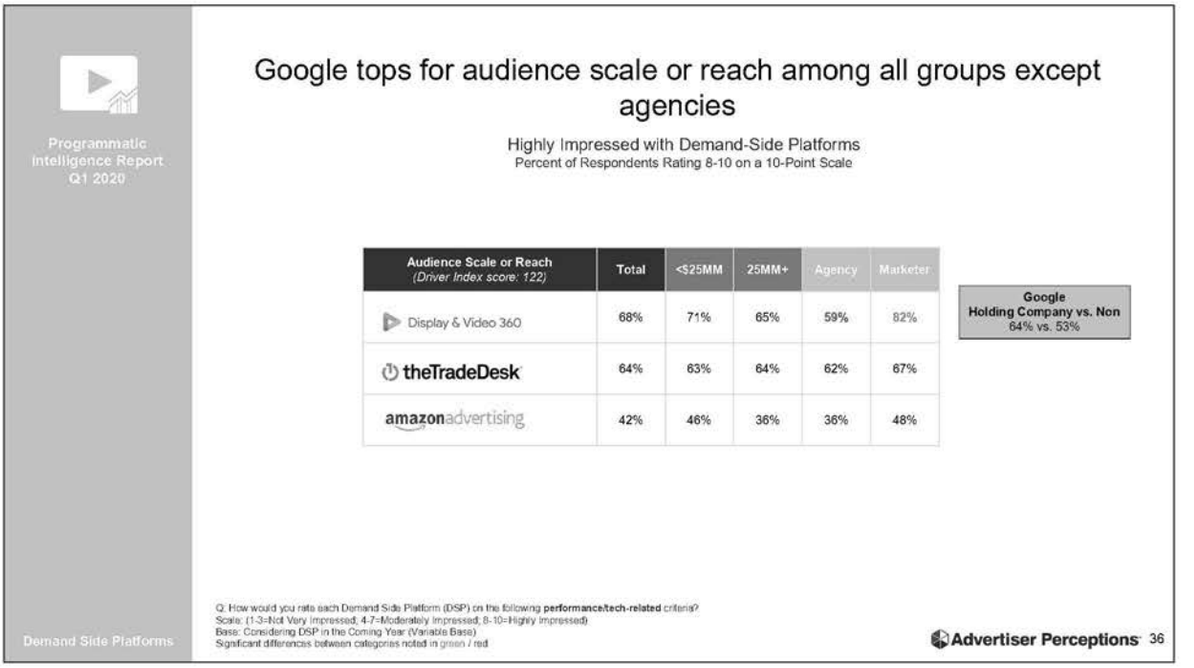
Demand Side Platforms

Advertiser Perceptions 34

Q235 Performance ratings



Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Google tops for audience scale or reach among all groups except agencies

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Audience Scale or Reach *(Driver Index score: 122)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	68%	71%	65%	59%	82%
theTradeDesk	64%	63%	64%	62%	67%
amazonadvertising	42%	46%	36%	36%	48%

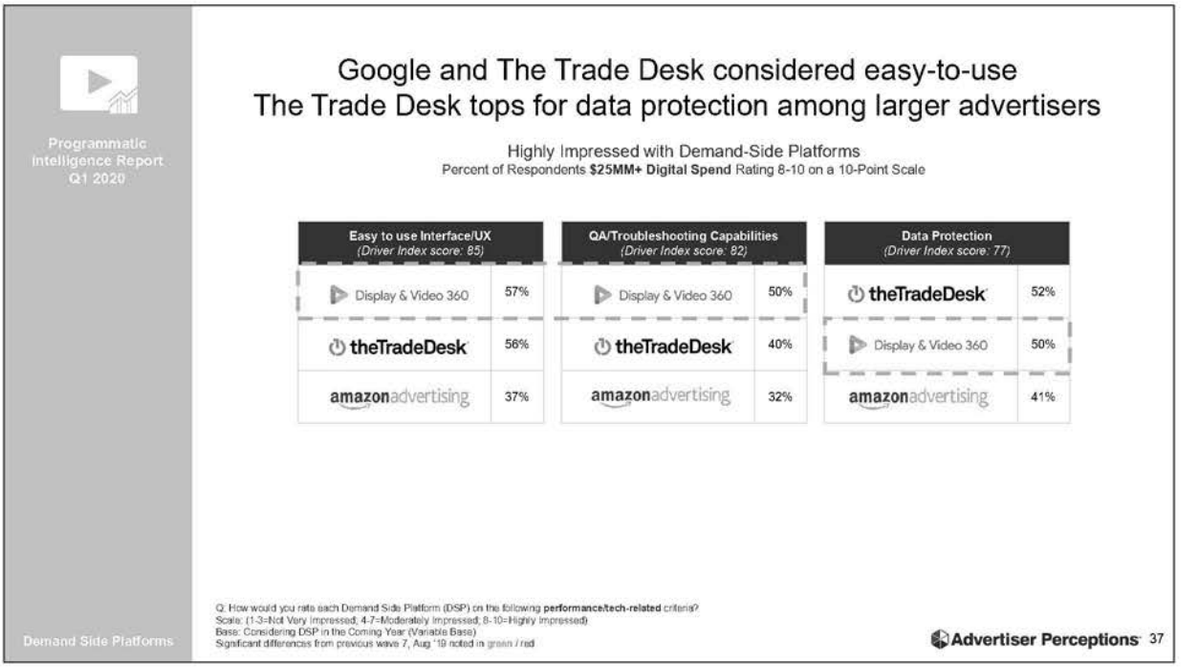
Google Holding Company vs. Non
64% vs. 53%

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

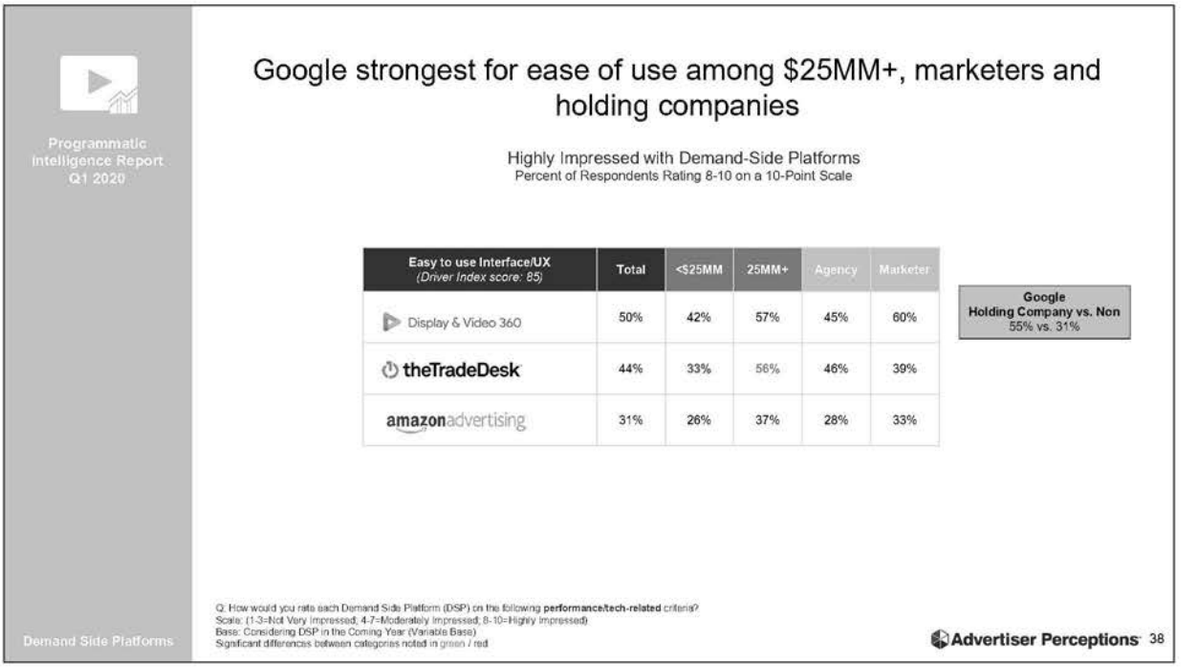
Demand Side Platforms

Advertiser Perceptions 36

Q235 Performance ratings



Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Google strongest for ease of use among $25MM+, marketers and holding companies

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Easy to use Interface/UX *(Driver Index score: 85)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	50%	42%	57%	45%	60%
theTradeDesk	44%	33%	56%	46%	39%
amazonadvertising	31%	26%	37%	28%	33%

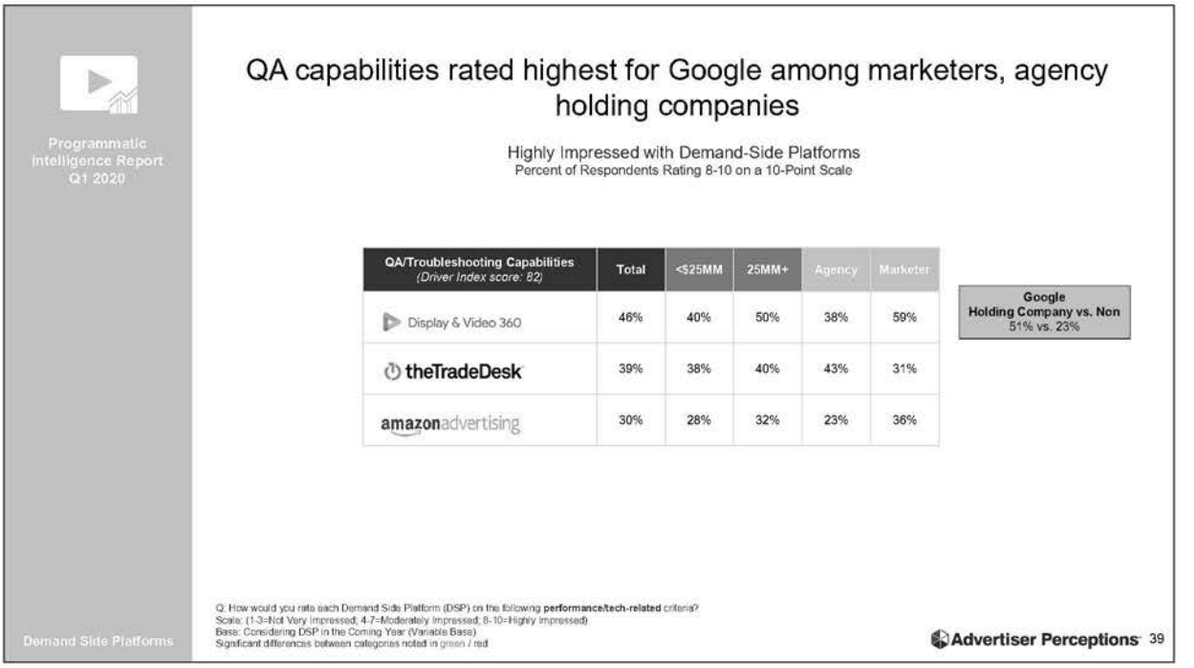
Google Holding Company vs. Non
55% vs. 31%

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

Advertiser Perceptions 38

Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

QA capabilities rated highest for Google among marketers, agency holding companies

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

QA/Troubleshooting Capabilities *(Driver Index score: 82)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	46%	40%	50%	38%	59%
theTradeDesk	39%	38%	40%	43%	31%
amazonadvertising	30%	28%	32%	23%	36%

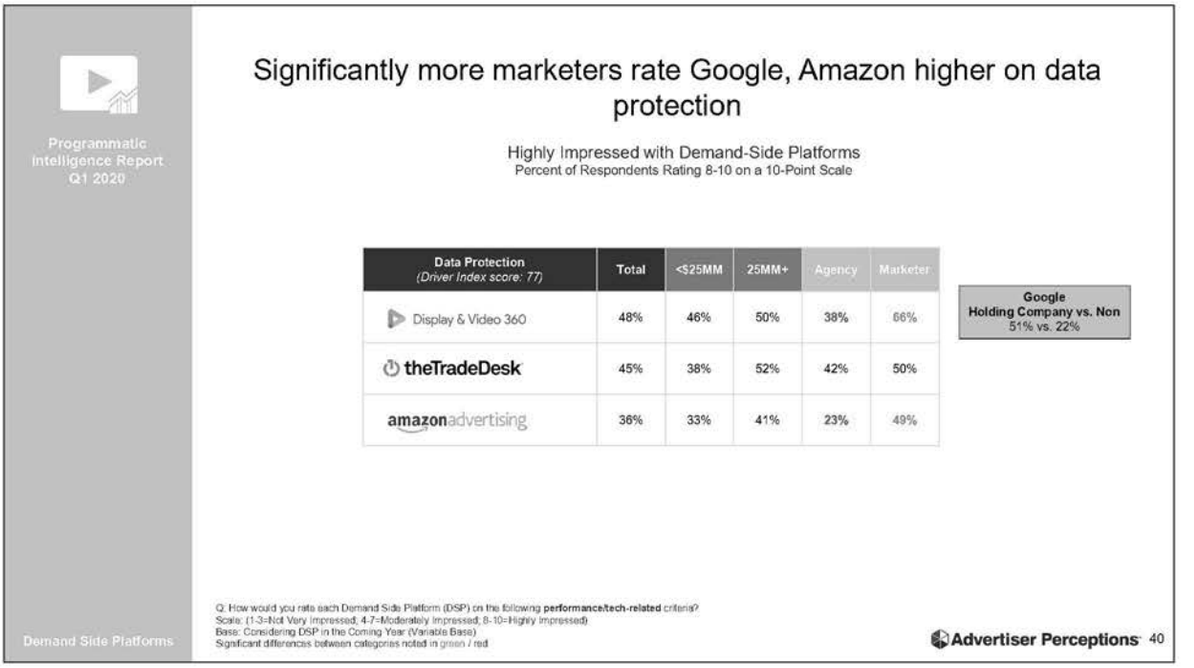
Google Holding Company vs. Non
51% vs. 23%

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

Advertiser Perceptions 39

Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Significantly more marketers rate Google, Amazon higher on data protection

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Data Protection *(Driver Index score: 77)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	48%	46%	50%	38%	66%
theTradeDesk	45%	38%	52%	42%	50%
amazonadvertising	36%	33%	41%	23%	49%

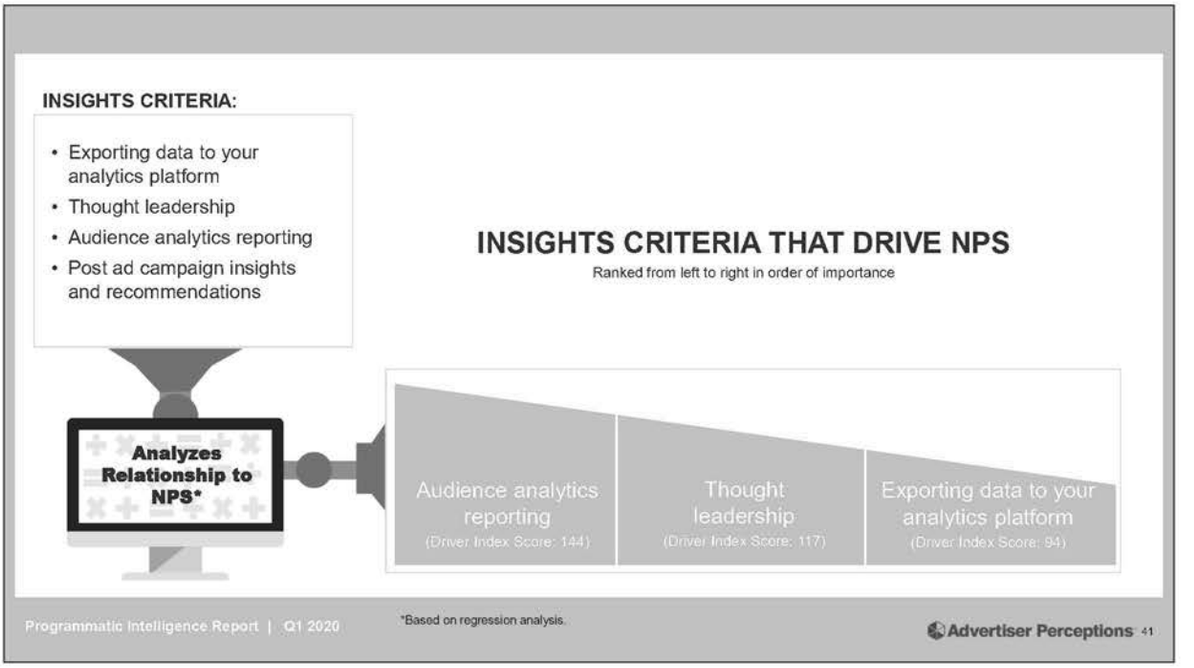
Google Holding Company vs. Non
51% vs. 22%

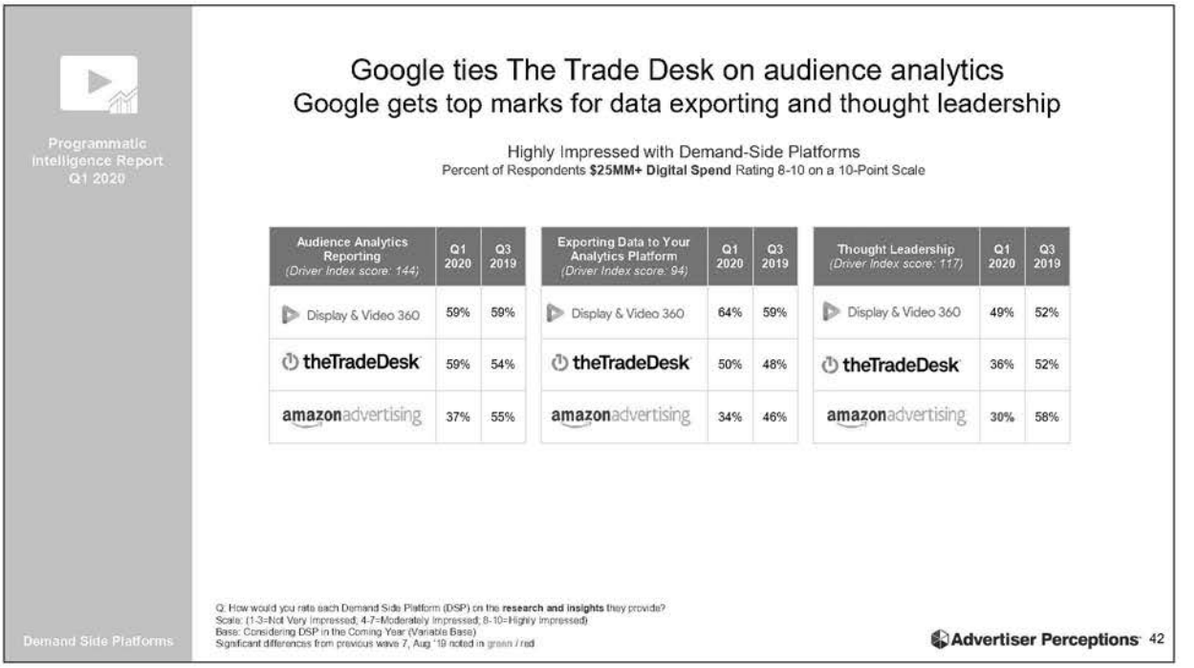
Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

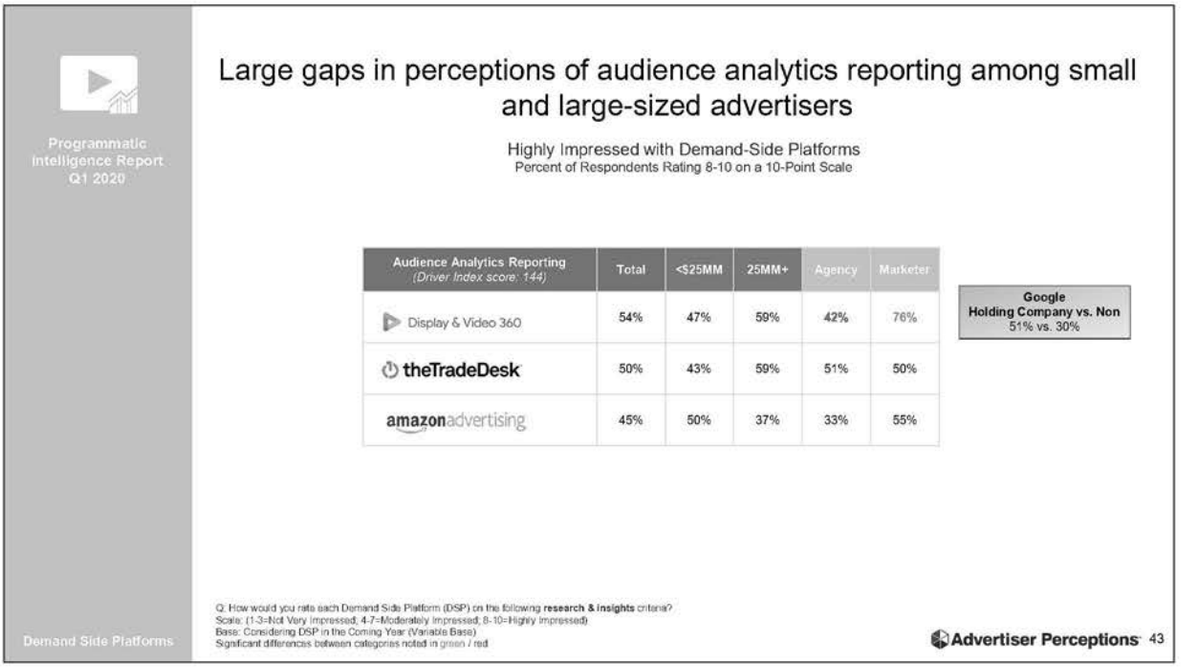
Advertiser Perceptions 40

Q235 Performance ratings


INSIGHTS CRITERIA:
• Exporting data to your analytics platform
• Thought leadership
• Audience analytics reporting
• Post ad campaign insights and recommendations
INSIGHTS CRITERIA THAT DRIVE NPS
Ranked from left to right in order of importance
Analyzes Relationship to NPS*
Audience analytics reporting
(Driver Index Score: 144)
Thought leadership
(Driver Index Score: 117)
Exporting data to your analytics platform
(Driver Index Score: 94)
Programmatic Intelligence Report | Q1 2020
*Based on regression analysis.
Advertiser Perceptions 41



Q240 Research and insights ratings



Programmatic Intelligence Report Q1 2020

Large gaps in perceptions of audience analytics reporting among small and large-sized advertisers

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Audience Analytics Reporting *(Driver Index score: 144)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	54%	47%	59%	42%	76%
theTradeDesk	50%	43%	59%	51%	50%
amazonadvertising	45%	50%	37%	33%	55%

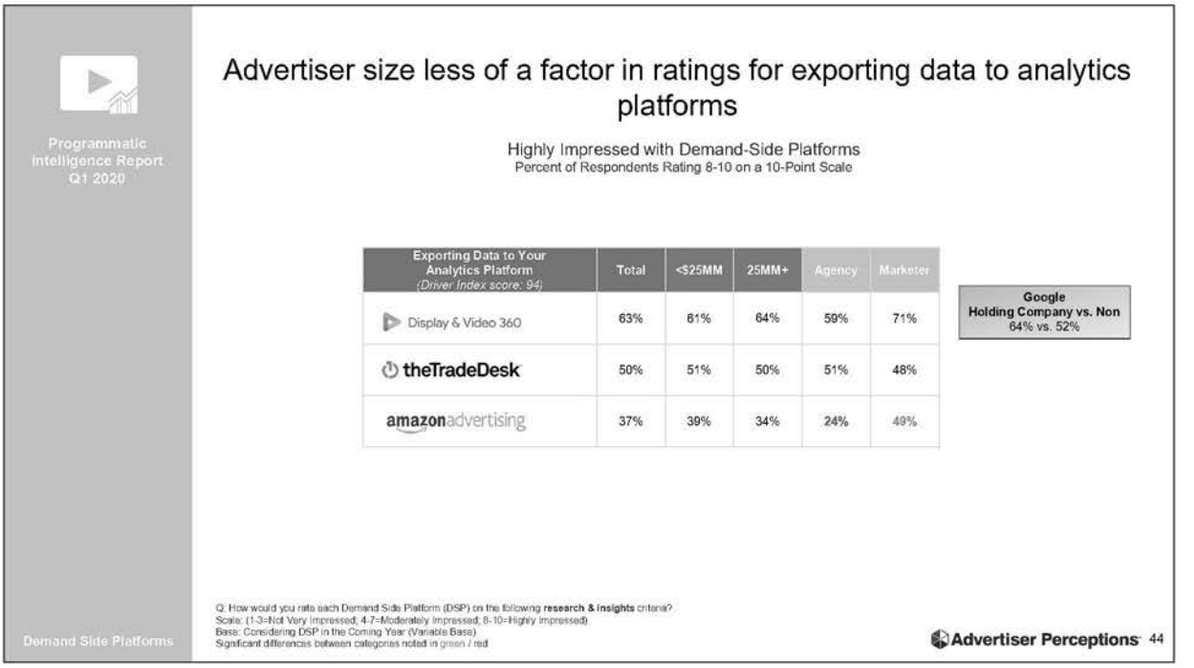
Google Holding Company vs. Non
51% vs. 30%

Q: How would you rate each Demand Side Platform (DSP) on the following **research & insights** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

Advertiser Perceptions 43

Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Advertiser size less of a factor in ratings for exporting data to analytics platforms

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Exporting Data to Your Analytics Platform *(Driver Index score: 94)*	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	63%	61%	64%	59%	71%
theTradeDesk	50%	51%	50%	51%	48%
amazonadvertising	37%	39%	34%	24%	49%

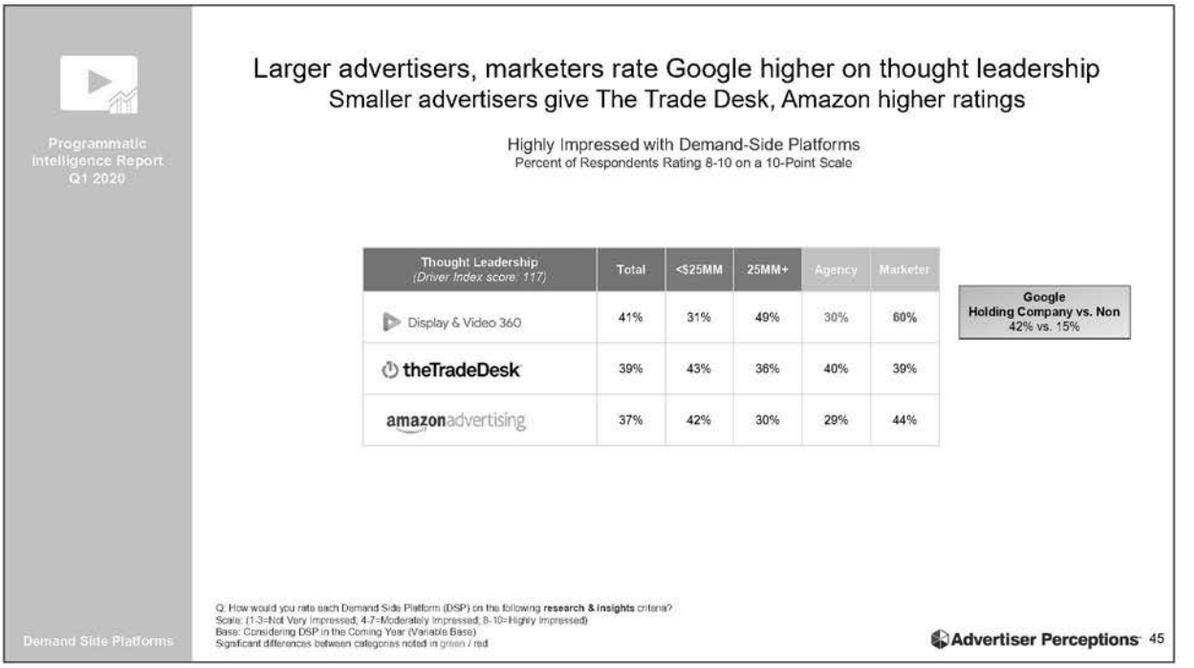
Google Holding Company vs. Non
64% vs. 52%

Q: How would you rate each Demand Side Platform (DSP) on the following **research & insights** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

Advertiser Perceptions 44

Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Larger advertisers, marketers rate Google higher on thought leadership
Smaller advertisers give The Trade Desk, Amazon higher ratings

Highly Impressed with Demand-Side Platforms
Percent of Respondents Rating 8-10 on a 10-Point Scale

Thought Leadership (Driver Index score: 117)	Total	<$25MM	25MM+	Agency	Marketer
Display & Video 360	41%	31%	49%	30%	60%
theTradeDesk	39%	43%	36%	40%	39%
amazonadvertising	37%	42%	30%	29%	44%

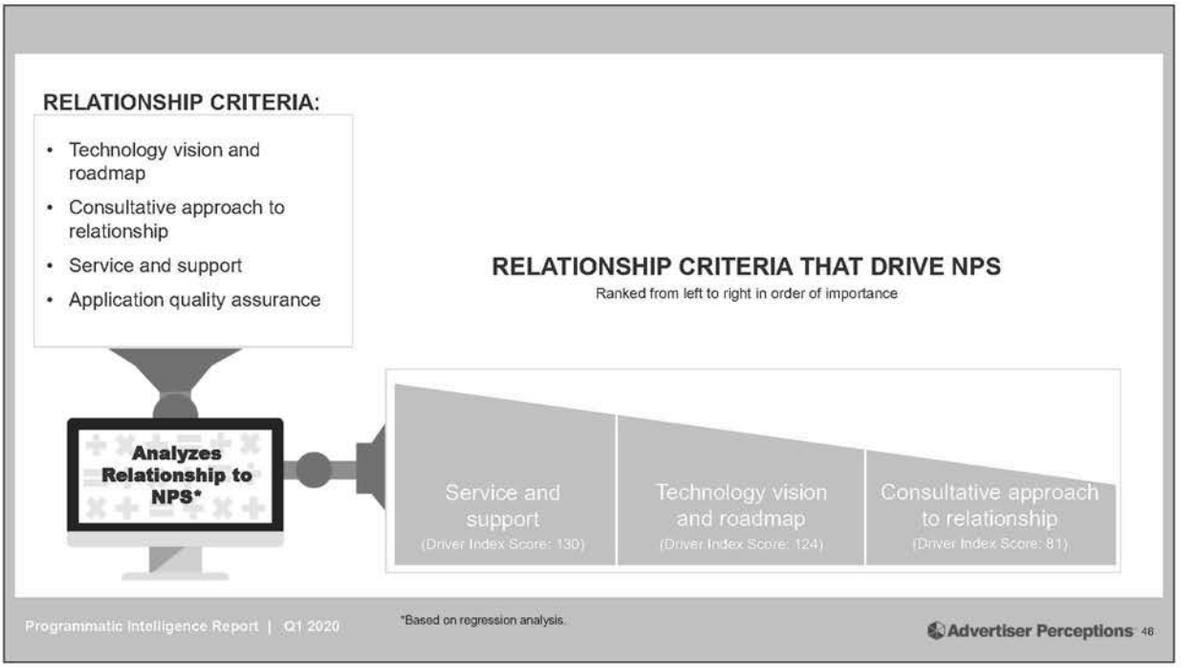
Google Holding Company vs. Non
42% vs. 15%

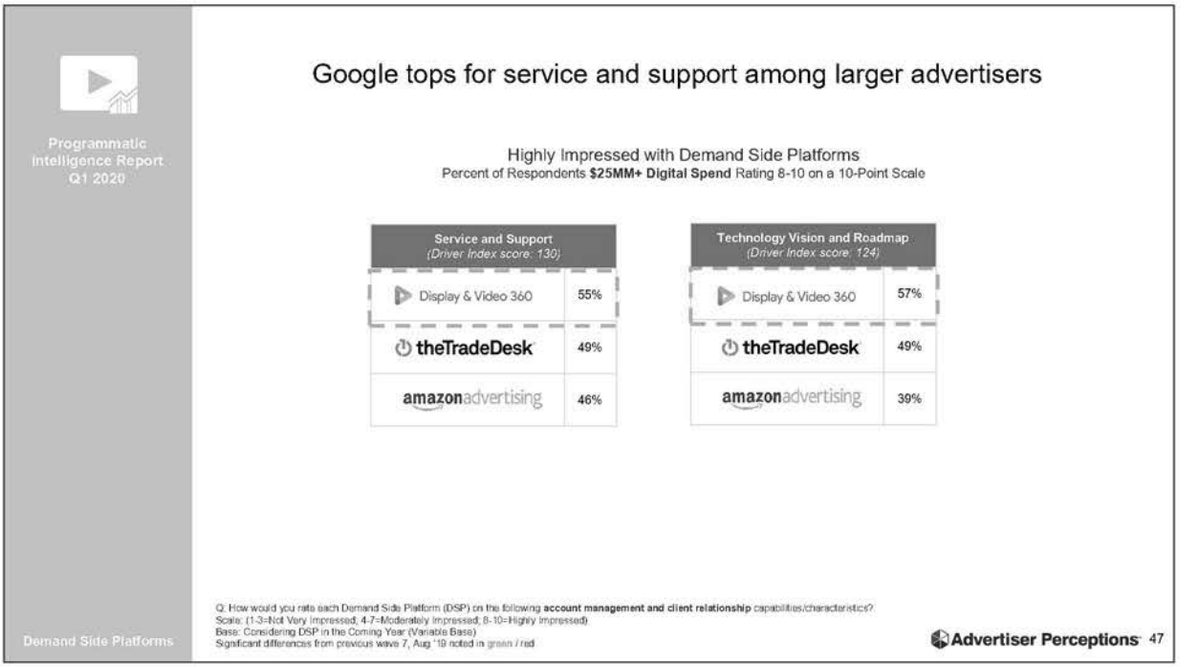
Q: How would you rate each Demand Side Platform (DSP) on the following **research & insights** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Significant differences between categories noted in green / red

Demand Side Platforms

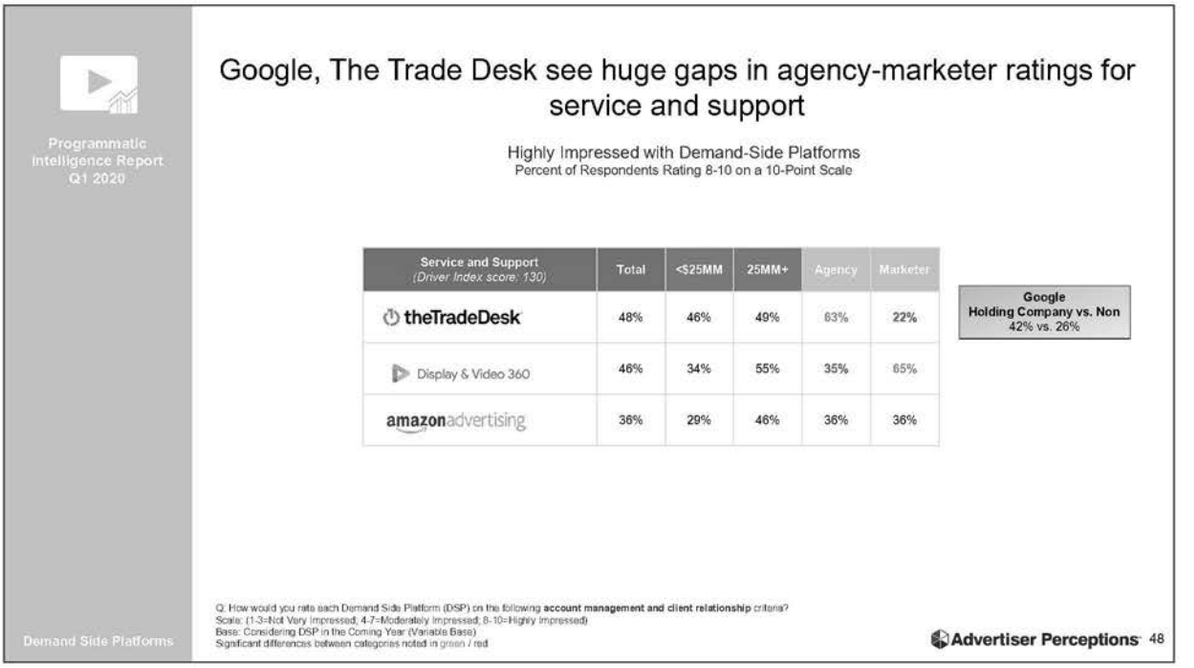
Advertiser Perceptions 45

Q235 Performance ratings

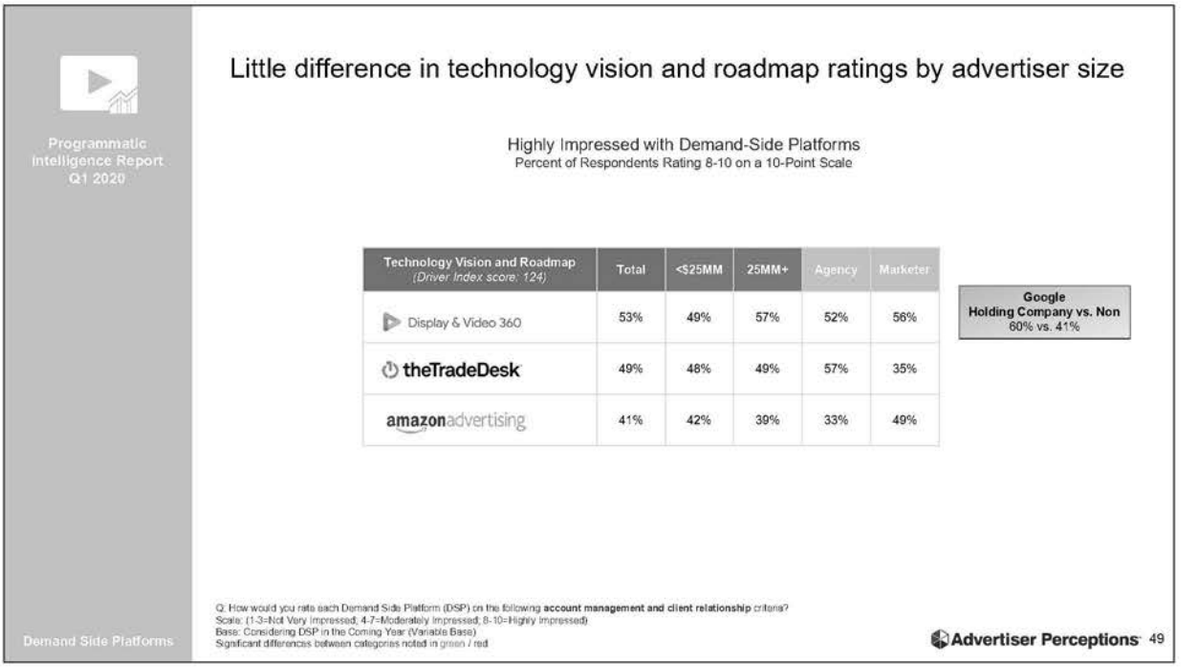

RELATIONSHIP CRITERIA:
• Technology vision and roadmap
• Consultative approach to relationship
• Service and support
• Application quality assurance
Analyzes Relationship to NPS*
RELATIONSHIP CRITERIA THAT DRIVE NPS
Ranked from left to right in order of importance
Service and support
(Driver Index Score: 130)
Technology vision and roadmap
(Driver Index Score: 124)
Consultative approach to relationship
(Driver Index Score: 81)
Programmatic Intelligence Report | Q1 2020
*Based on regression analysis.
Advertiser Perceptions 46



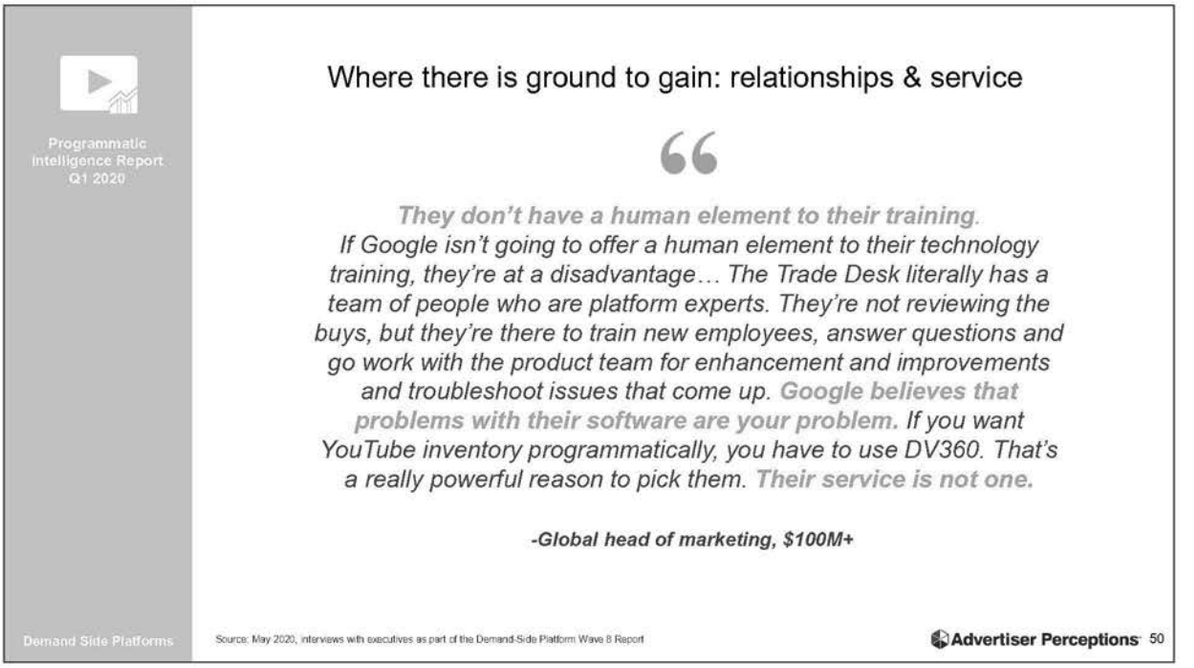
Q245 Relationship ratings

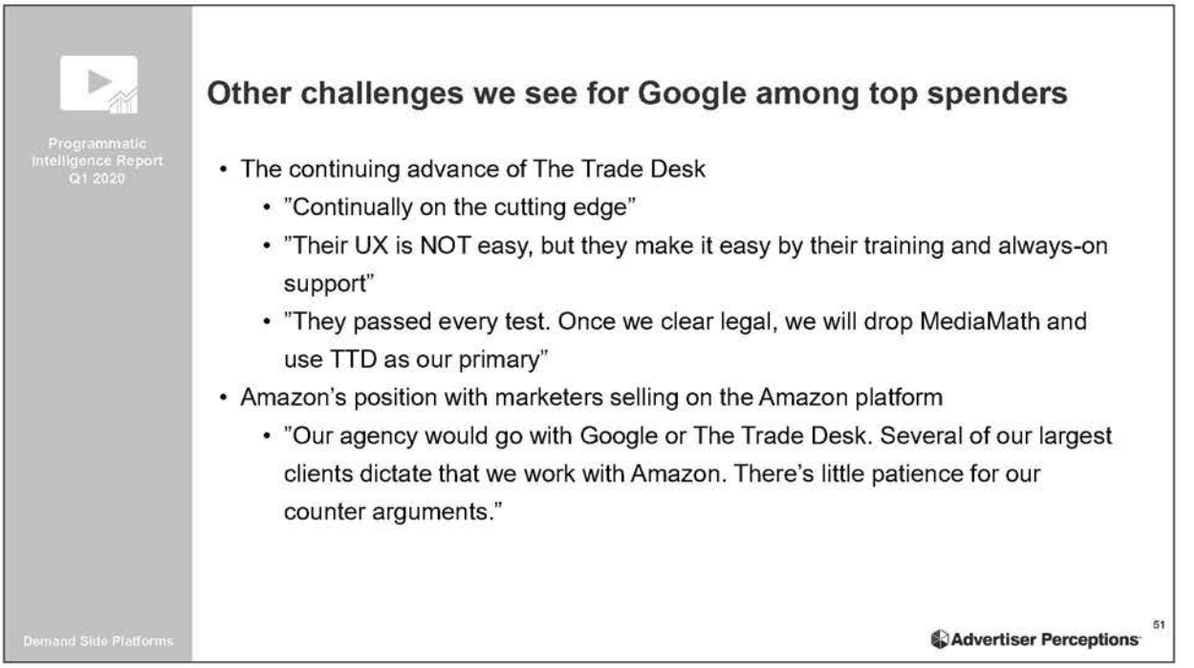


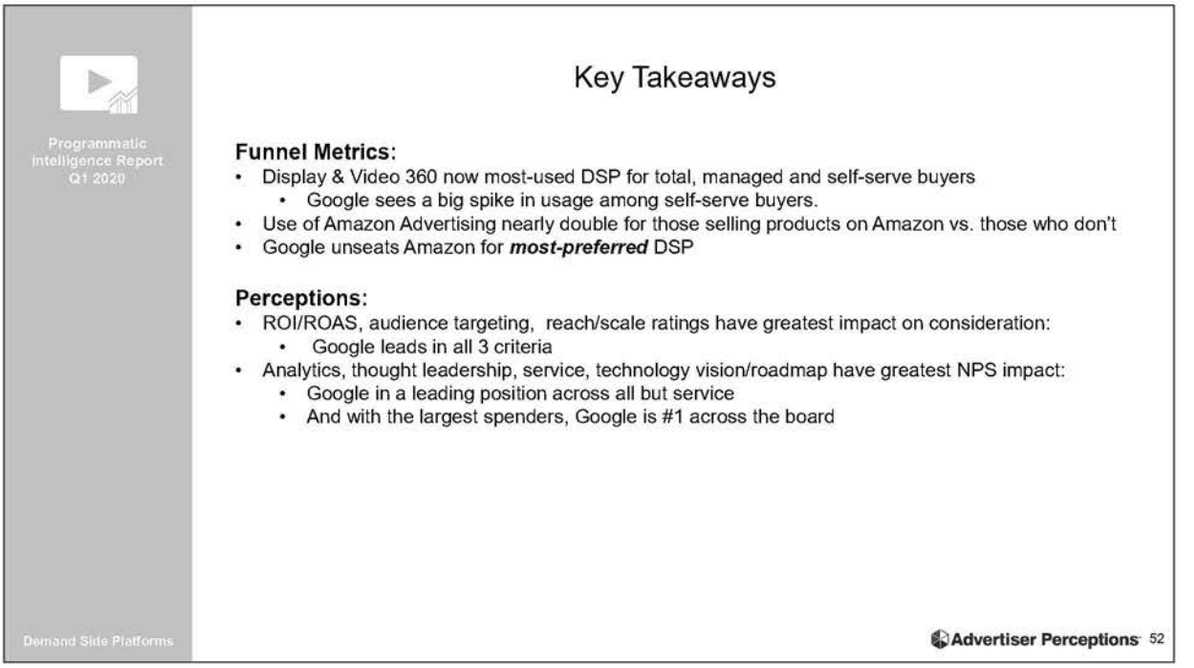
Q235 Performance ratings

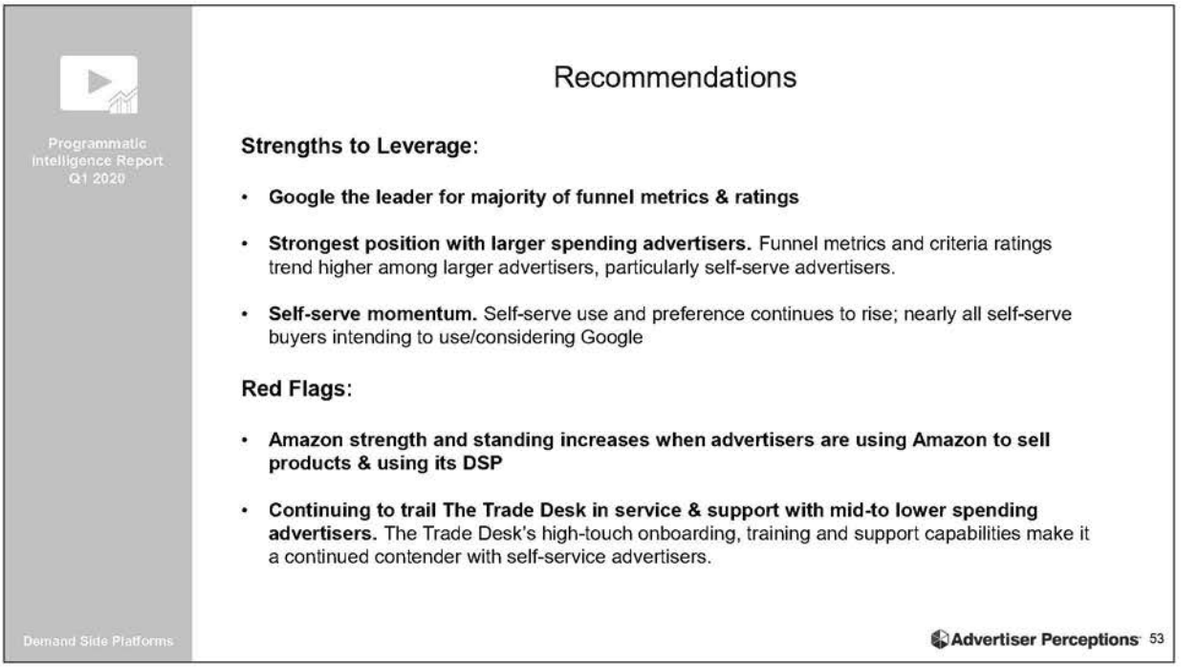


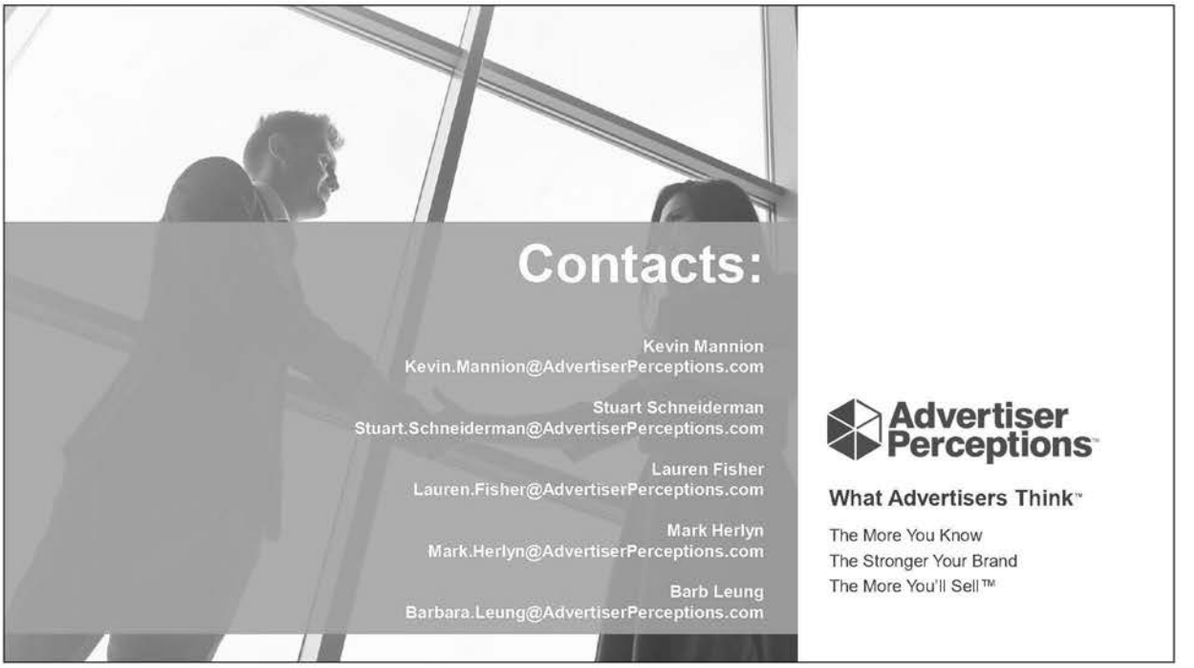
Q235 Performance ratings


Programmatic Intelligence Report Q1 2020
Where there is ground to gain: relationships & service
They don't have a human element to their training. If Google isn't going to offer a human element to their technology training, they're at a disadvantage… The Trade Desk literally has a team of people who are platform experts. They're not reviewing the buys, but they're there to train new employees, answer questions and go work with the product team for enhancement and improvements and troubleshoot issues that come up. Google believes that problems with their software are your problem. If you want YouTube inventory programmatically, you have to use DV360. That's a really powerful reason to pick them. Their service is not one.
-Global head of marketing, $100M+
Demand Side Platforms
Source: May 2020, interviews with executives as part of the Demand-Side Platform Wave 8 Report
Advertiser Perceptions 50


Programmatic Intelligence Report Q1 2020
Other challenges we see for Google among top spenders
• The continuing advance of The Trade Desk
• "Continually on the cutting edge"
• "Their UX is NOT easy, but they make it easy by their training and always-on support"
• "They passed every test. Once we clear legal, we will drop MediaMath and use TTD as our primary"
• Amazon's position with marketers selling on the Amazon platform
• "Our agency would go with Google or The Trade Desk. Several of our largest clients dictate that we work with Amazon. There's little patience for our counter arguments."
Demand Side Platforms
Advertiser Perceptions
51


Programmatic
Intelligence Report
Q1 2020
Key Takeaways
Funnel Metrics:
• Display & Video 360 now most-used DSP for total, managed and self-serve buyers
• Google sees a big spike in usage among self-serve buyers.
• Use of Amazon Advertising nearly double for those selling products on Amazon vs. those who don't
• Google unseats Amazon for most-preferred DSP
Perceptions:
• ROI/ROAS, audience targeting, reach/scale ratings have greatest impact on consideration:
• Google leads in all 3 criteria
• Analytics, thought leadership, service, technology vision/roadmap have greatest NPS impact:
• Google in a leading position across all but service
• And with the largest spenders, Google is #1 across the board
Demand Side Platforms
Advertiser Perceptions 52


Programmatic Intelligence Report Q1 2020
Recommendations
Strengths to Leverage:
• Google the leader for majority of funnel metrics & ratings
• Strongest position with larger spending advertisers. Funnel metrics and criteria ratings trend higher among larger advertisers, particularly self-serve advertisers.
• Self-serve momentum. Self-serve use and preference continues to rise; nearly all self-serve buyers intending to use/considering Google
Red Flags:
• Amazon strength and standing increases when advertisers are using Amazon to sell products & using its DSP
• Continuing to trail The Trade Desk in service & support with mid-to lower spending advertisers. The Trade Desk's high-touch onboarding, training and support capabilities make it a continued contender with self-service advertisers.
Demand Side Platforms
Advertiser Perceptions 53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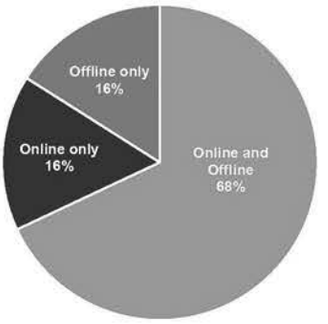
Advertiser Perceptions
What Advertisers Think™
The More You Know
The Stronger Your Brand
The More You'll Sell™

Appendix
Advertiser Perceptions

Programmatic Intelligence Report Q1 2020

Two-third marketers sell products both online and offline

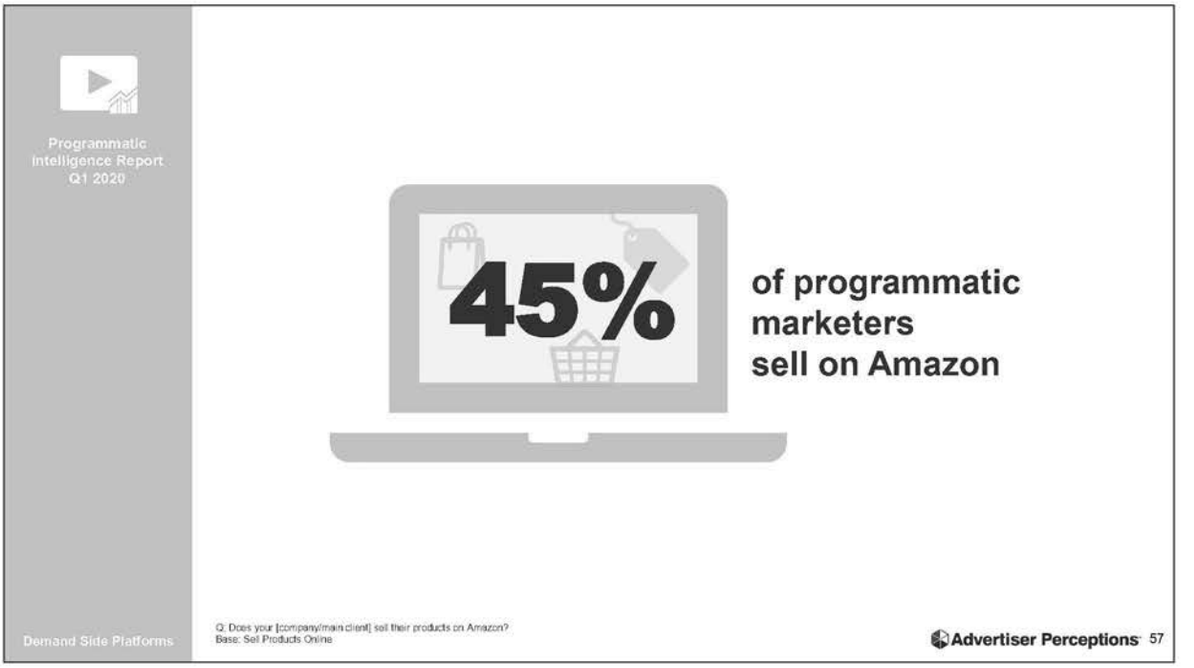
Sales Channels: Online, Offline or Both
Percent of Respondents

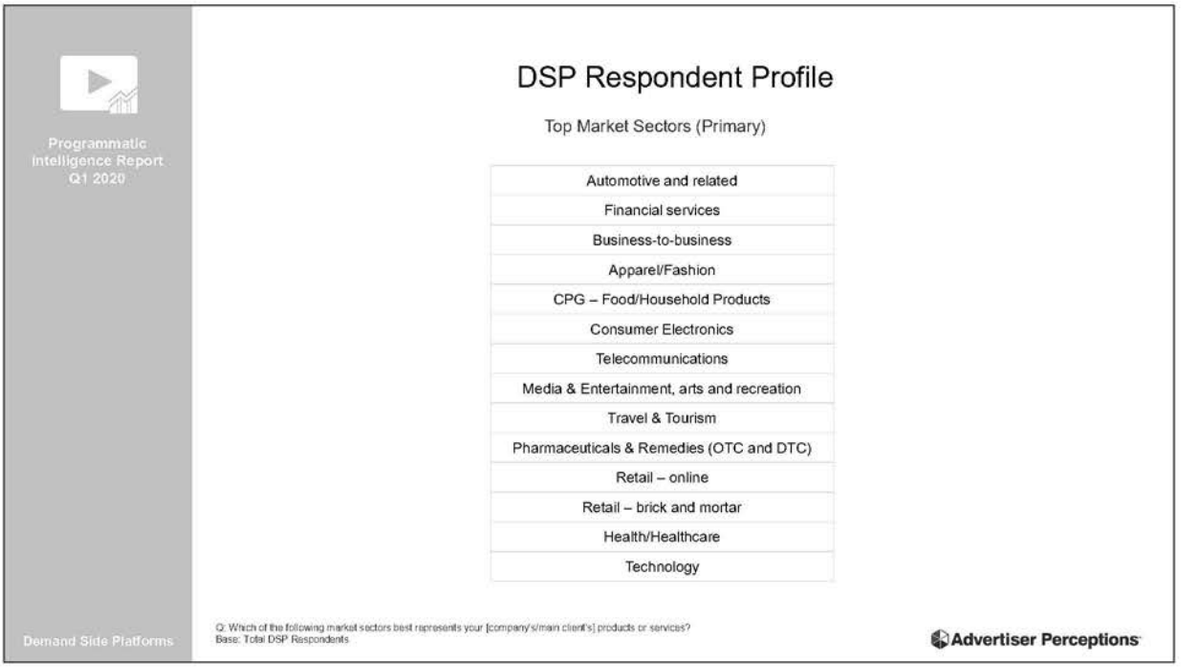


Q: Does your [company/main client] primarily sell their products or services online or offline?
Base: Total Respondents

Demand Side Platforms

Advertiser Perceptions 56

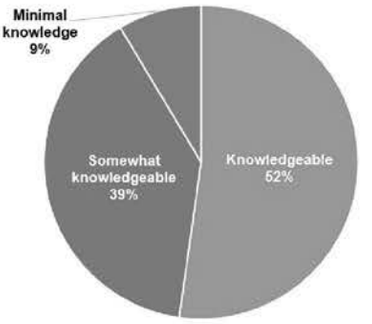

Programmatic
Intelligence Report
Q1 2020
45%
of programmatic
marketers
sell on Amazon
Demand Side Platforms
Q: Does your [company/main client] sell their products on Amazon?
Base: Sell Products Online
Advertiser Perceptions 57


Programmatic Intelligence Report Q1 2020
DSP Respondent Profile
Top Market Sectors (Primary)
Automotive and related
Financial services
Business-to-business
Apparel/Fashion
CPG – Food/Household Products
Consumer Electronics
Telecommunications
Media & Entertainment, arts and recreation
Travel & Tourism
Pharmaceuticals & Remedies (OTC and DTC)
Retail – online
Retail – brick and mortar
Health/Healthcare
Technology
Demand Side Platforms
Q: Which of the following market sectors best represents your [company's/main client's] products or services?
Base: Total DSP Respondents
Advertiser Perceptions

Programmatic Intelligence Report Q1 2020

DSP Respondent Profile

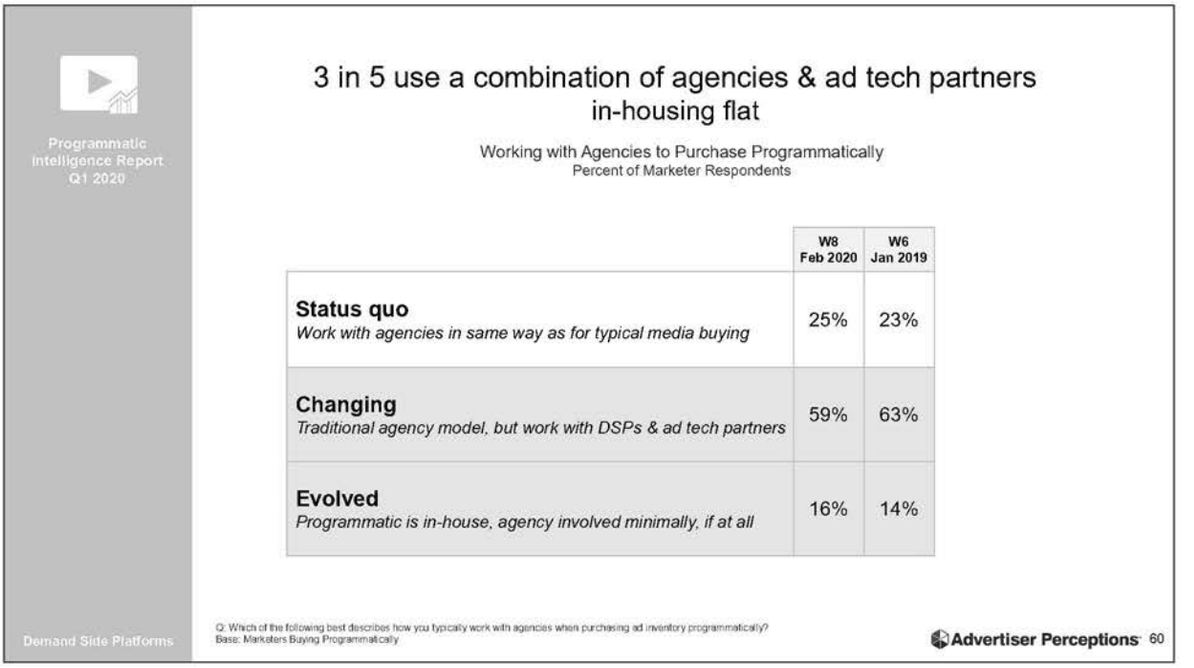
DSP Budgeting Knowledge



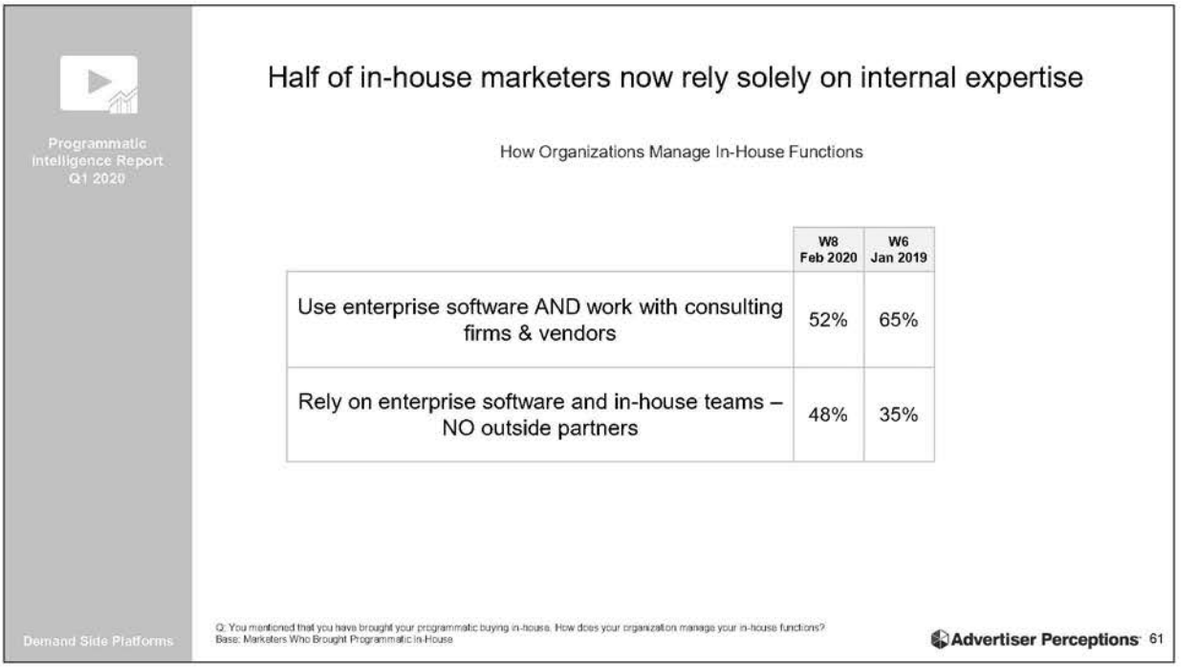
Q: How **knowledgeable** are you about your [company's/main client's] **Demand Side Platform (DSP) budgeting** (i.e. vendor budget allocations, self-serve vs. managed services spending, etc.)?
Base: Total DSP Respondents

Advertiser Perceptions

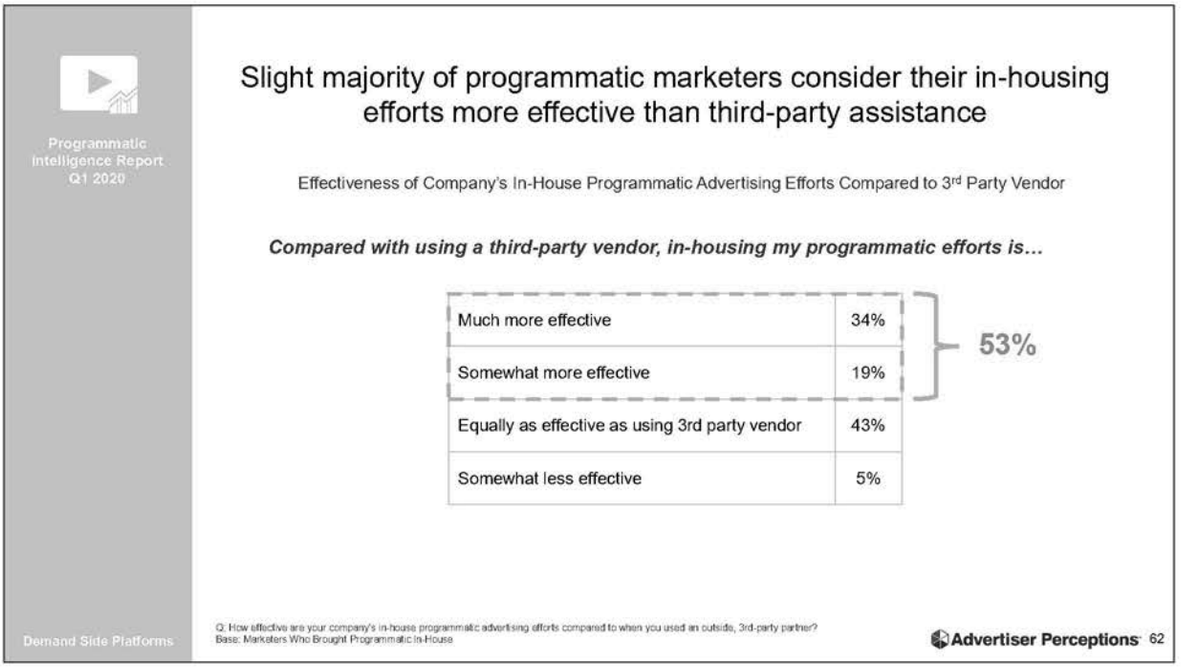
Demand Side Platforms


Programmatic Intelligence Report Q1 2020
3 in 5 use a combination of agencies & ad tech partners in-housing flat
Working with Agencies to Purchase Programmatically
Percent of Marketer Respondents
W8 Feb 2020
W6 Jan 2019
Status quo
Work with agencies in same way as for typical media buying
25%
23%
Changing
Traditional agency model, but work with DSPs & ad tech partners
59%
63%
Evolved
Programmatic is in-house, agency involved minimally, if at all
16%
14%
Demand Side Platforms
Q: Which of the following best describes how you typically work with agencies when purchasing ad inventory programmatically?
Base: Marketers Buying Programmatically
Advertiser Perceptions
60

Q23



Q24
Base size W8 is n=44 respondents
Base size W6 is n=29 respondents



Q25 – NEW IN WAVE 8
Base size is n=44 respondents

METHODOLOGY
& RESPONDENT PROFILE

AD PROS
ADVERTISER PERCEPTIONS

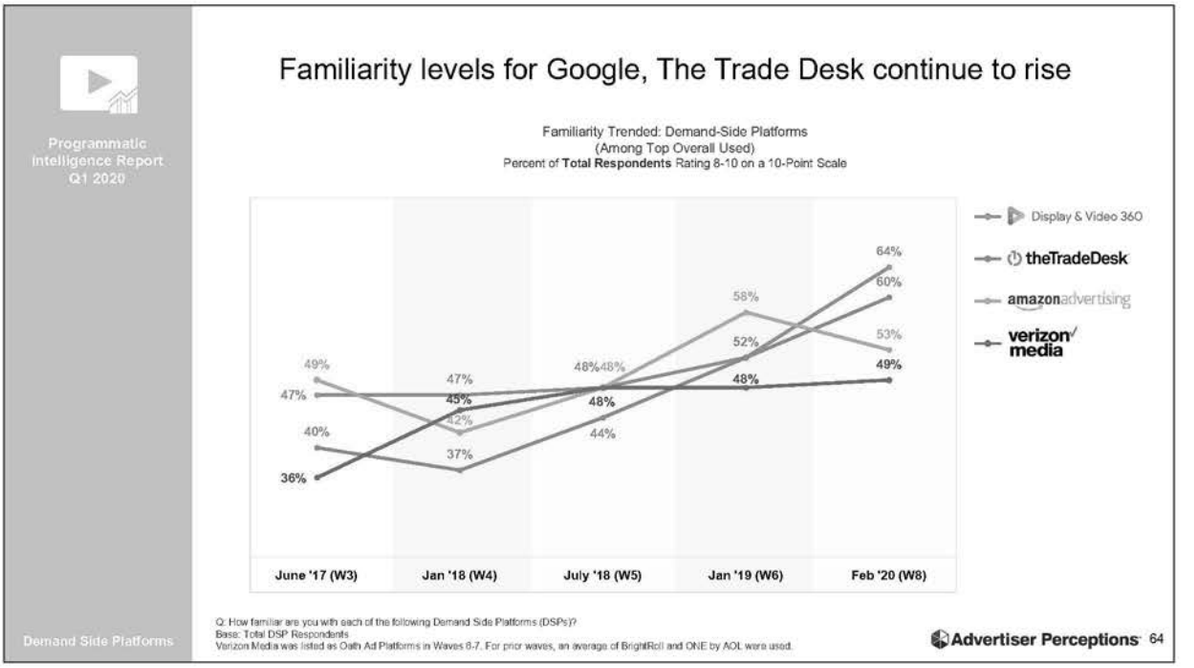
Our Ad Pros Community represents the brands and agencies that are spending the most on advertising and marketing in the U.S. We continuously update, supplement, and refine the community based on movement in the market.

June Omnibus Report

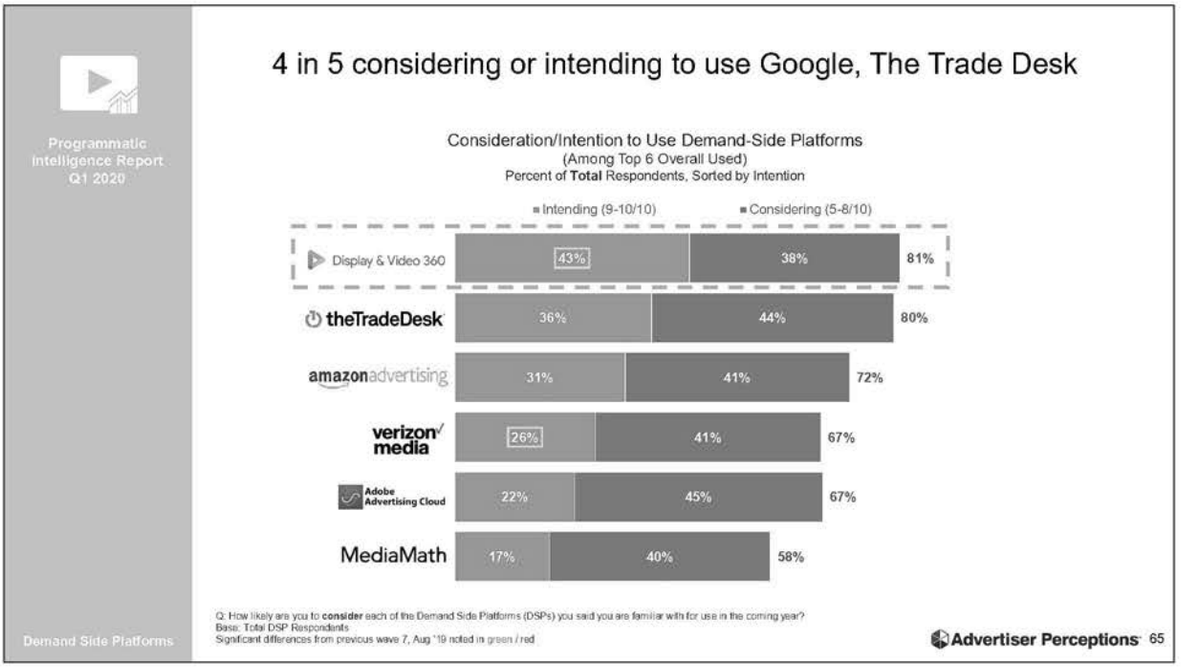
- INTERVIEWS CONDUCTED: 300
- SURVEY FIELDED: June 1st – 8th, 2020
- EXPRESSING OPINIONS FROM: **40%** MARKETER **60%** AGENCY
- RANGING IN TITLE:

36% SENIOR	40% MID-LEVEL	24% JUNIOR
VP+	Director/Supervisor	Manager/Planner/Buyer

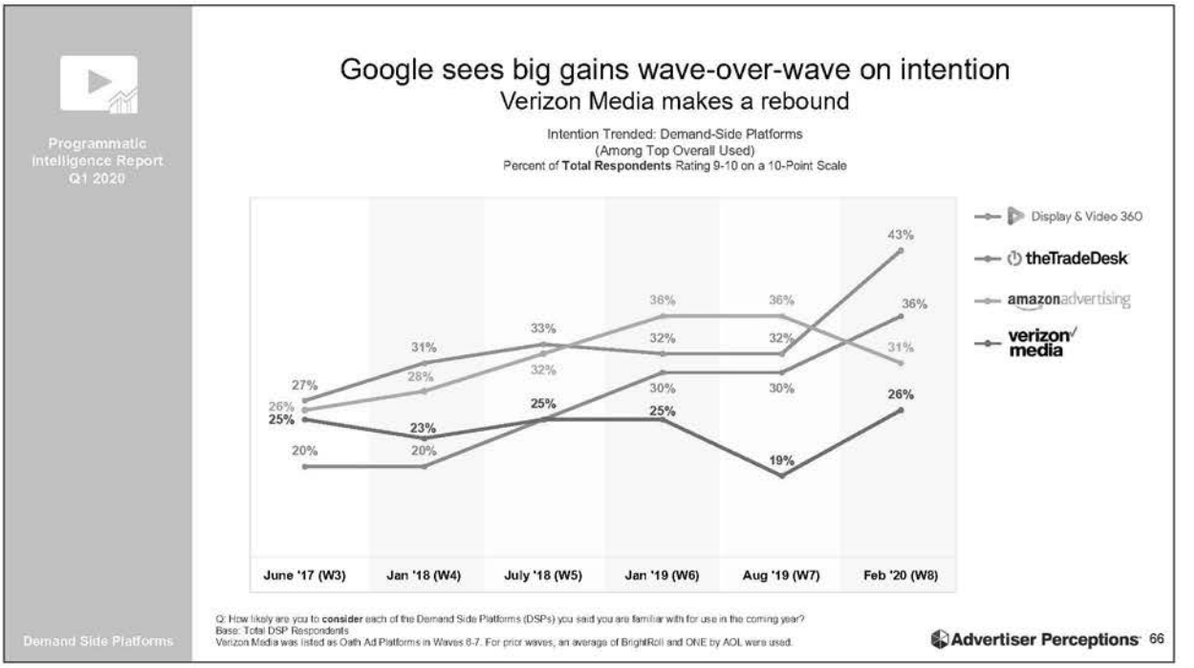
- **SAMPLE**: Marketer and agency contacts from The Advertiser Perceptions Ad Pros proprietary community and trusted third-party partners as needed
- **QUALIFICATION:** 100% involved in media brand selection decisions
- **WEIGHTING:** Data has been sample-balanced and weighted to reflect relative agency/marketer influence
- Incentives include cash and information


Programmatic Intelligence Report Q1 2020
Familiarity levels for Google, The Trade Desk continue to rise
Familiarity Trended: Demand-Side Platforms
(Among Top Overall Used)
Percent of Total Respondents Rating 8-10 on a 10-Point Scale
Display & Video 360
theTradeDesk
amazonadvertising
verizon media
49%
47%
40%
36%
47%
45%
42%
37%
48%48%
48%
44%
58%
52%
48%
64%
60%
53%
49%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Jan '19 (W6)
Feb '20 (W8)
Q: How familiar are you with each of the following Demand Side Platforms (DSPs)?
Base: Total DSP Respondents
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions 64

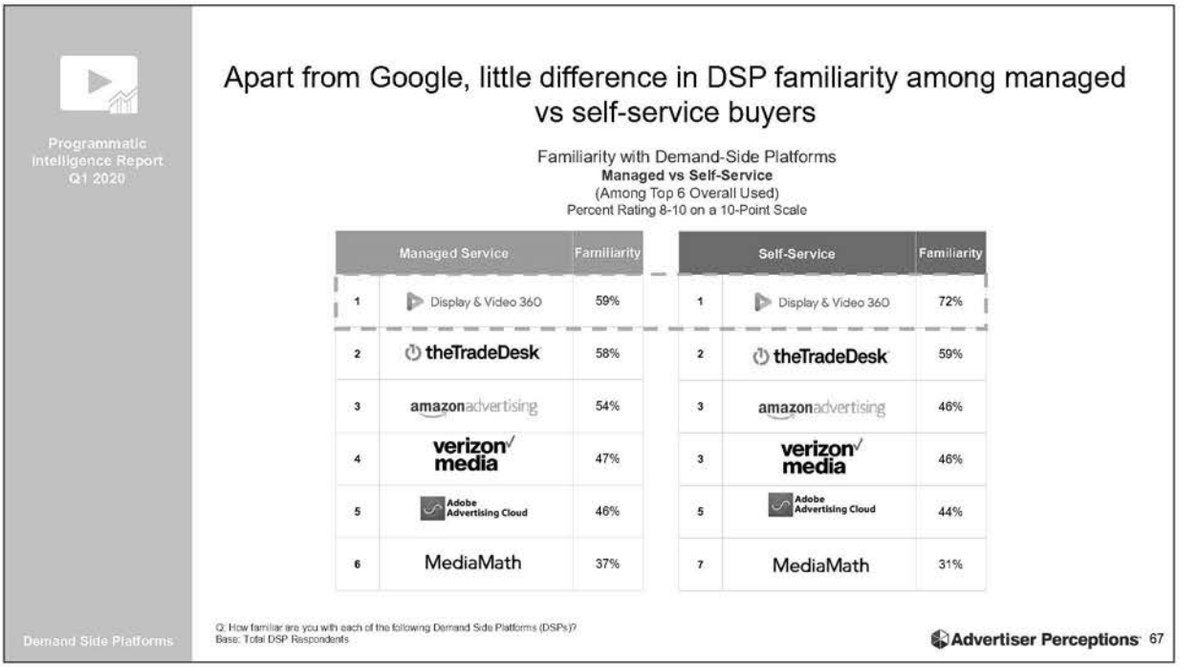
Q220



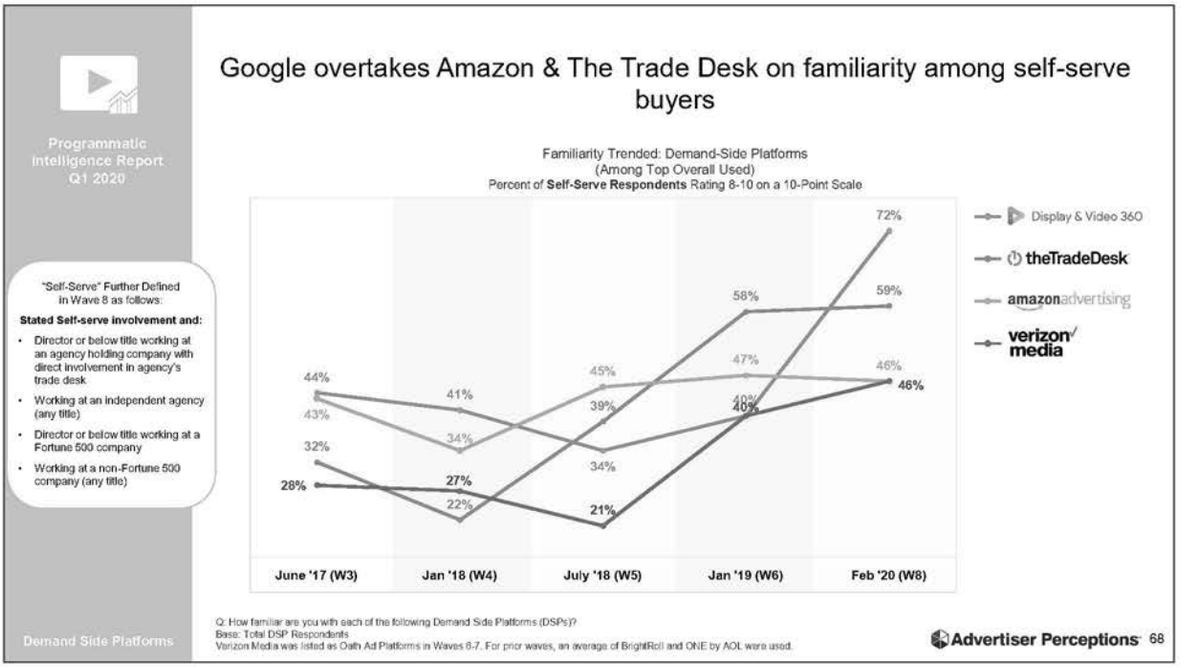
Q220 Consideration/Intention


Programmatic Intelligence Report Q1 2020
Google sees big gains wave-over-wave on intention
Verizon Media makes a rebound
Intention Trended: Demand-Side Platforms
(Among Top Overall Used)
Percent of Total Respondents Rating 9-10 on a 10-Point Scale
Display & Video 360
theTradeDesk
amazonadvertising
verizon media
27%
31%
33%
36%
36%
43%
26%
28%
32%
32%
32%
36%
25%
23%
25%
25%
30%
31%
20%
20%
30%
19%
26%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Jan '19 (W6)
Aug '19 (W7)
Feb '20 (W8)
Q: How likely are you to consider each of the Demand Side Platforms (DSPs) you said you are familiar with for use in the coming year?
Base: Total DSP Respondents
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions 66

Q220



Q210 Familiarity


Programmatic Intelligence Report Q1 2020
Google overtakes Amazon & The Trade Desk on familiarity among self-serve buyers
Familiarity Trended: Demand-Side Platforms
(Among Top Overall Used)
Percent of Self-Serve Respondents Rating 8-10 on a 10-Point Scale
"Self-Serve" Further Defined in Wave 8 as follows:
Stated Self-serve involvement and:
• Director or below title working at an agency holding company with direct involvement in agency's trade desk
• Working at an independent agency (any title)
• Director or below title working at a Fortune 500 company
• Working at a non-Fortune 500 company (any title)
Display & Video 360
theTradeDesk
amazonadvertising
verizon media
44%
43%
32%
28%
41%
34%
27%
22%
45%
39%
34%
21%
58%
48%
72%
47%
46%
59%
46%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Jan '19 (W6)
Feb '20 (W8)
Q: How familiar are you with each of the following Demand Side Platforms (DSPs)?
Base: Total DSP Respondents
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions 68

Q220

Programmatic Intelligence Report Q1 2020

Selling products on Amazon* influences use of Amazon Advertising

Past 12-Month Usage of Demand-Side Platforms
Sell vs Don't Sell Products on Amazon
(Top 6 Overall Used)

	Sell Products on Amazon	Usage
1	amazonadvertising	62%
2	verizon media	42%
3	Display & Video 360	41%
4	theTradeDesk	40%
5	Adobe Advertising Cloud	36%
6	MediaMath	28%

	Do Not Sell Products on Amazon	Usage
1	Display & Video 360	45%
2	theTradeDesk	41%
3	amazonadvertising	32%
4	Adobe Advertising Cloud	23%
5	MediaMath	21%
6	verizon media	20%

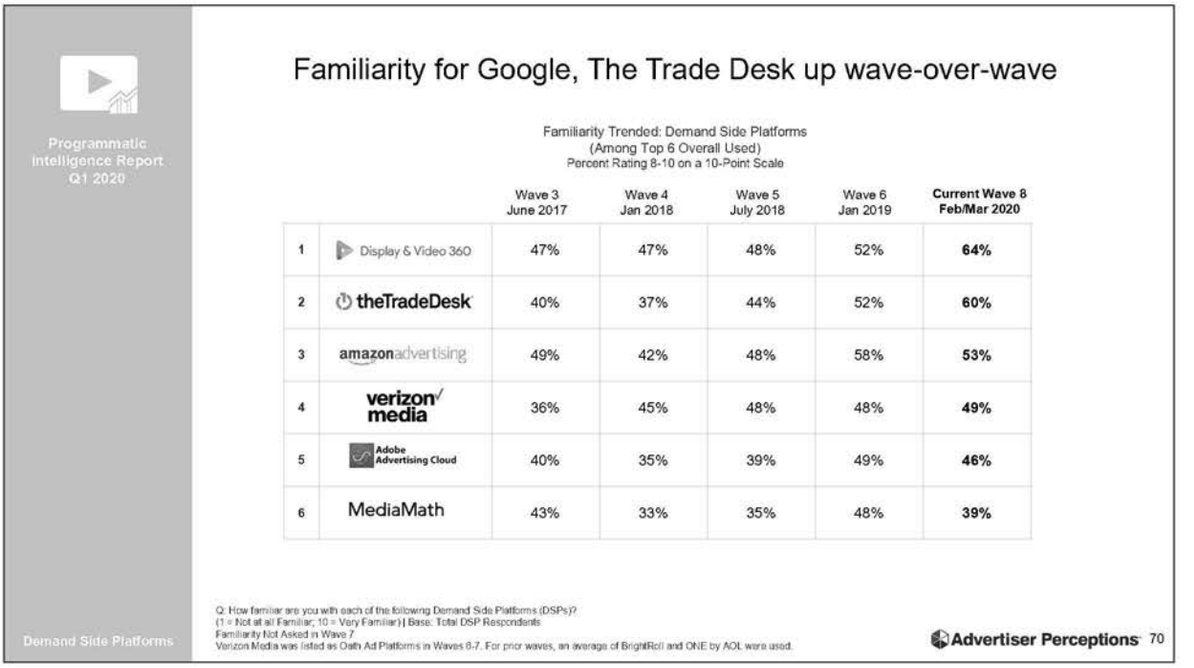
*Accounts for 45% of programmatic buyers surveyed

Q: Of the Demand Side Platforms (DSPs) that you are familiar with, which have you **used** in the past 12 months?
Base: Total DSP Respondents
Significant differences between Amazon and non-Amazon product sellers noted in green / red

Demand Side Platforms

Advertiser Perceptions 69

Q215 Usage
S80b Amazon



Programmatic Intelligence Report Q1 2020

Familiarity for Google, The Trade Desk up wave-over-wave

Familiarity Trended: Demand Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

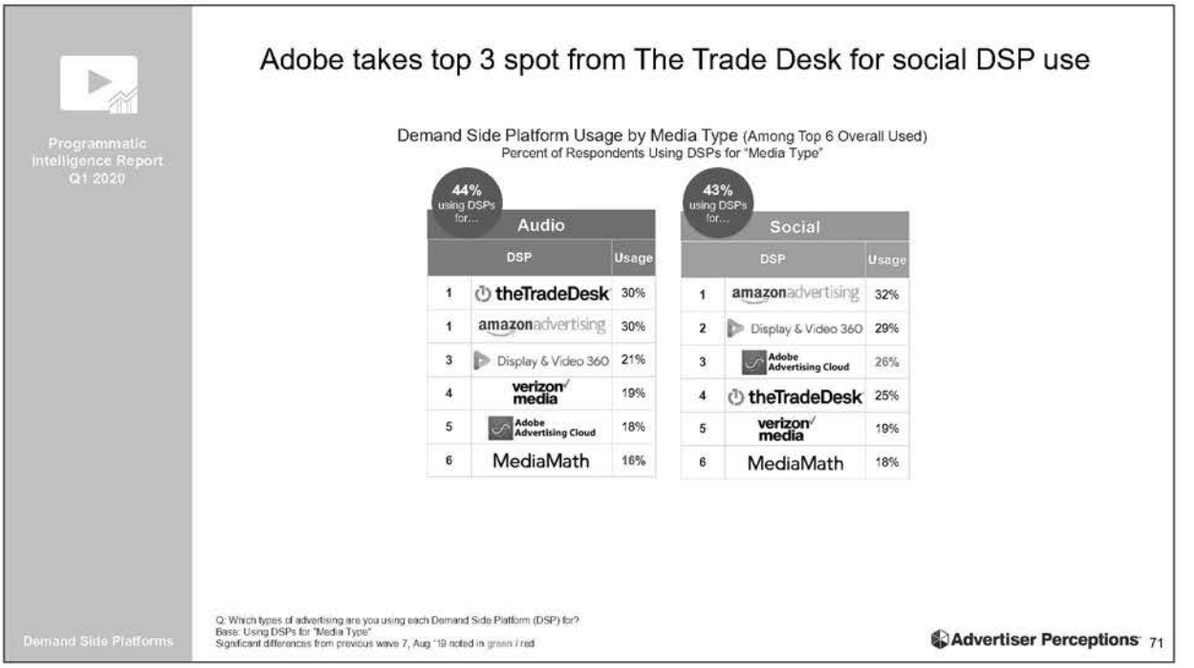
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Current Wave 8 Feb/Mar 2020
1	Display & Video 360	47%	47%	48%	52%	**64%**
2	theTradeDesk	40%	37%	44%	52%	**60%**
3	amazonadvertising	49%	42%	48%	58%	**53%**
4	verizon media	36%	45%	48%	48%	**49%**
5	Adobe Advertising Cloud	40%	35%	39%	49%	**46%**
6	MediaMath	43%	33%	35%	48%	**39%**

Q: How familiar are you with each of the following Demand Side Platforms (DSPs)?
(1 = Not at all Familiar; 10 = Very Familiar) | Base: Total DSP Respondents
Familiarity Not Asked in Wave 7
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Demand Side Platforms

Advertiser Perceptions 70

Q220



Programmatic Intelligence Report Q1 2020

Adobe takes top 3 spot from The Trade Desk for social DSP use

Demand Side Platform Usage by Media Type (Among Top 6 Overall Used)
Percent of Respondents Using DSPs for "Media Type"

44% using DSPs for...

Audio

	DSP	Usage
1	theTradeDesk	30%
1	amazonadvertising	30%
3	Display & Video 360	21%
4	verizon media	19%
5	Adobe Advertising Cloud	18%
6	MediaMath	16%

43% using DSPs for...

Social

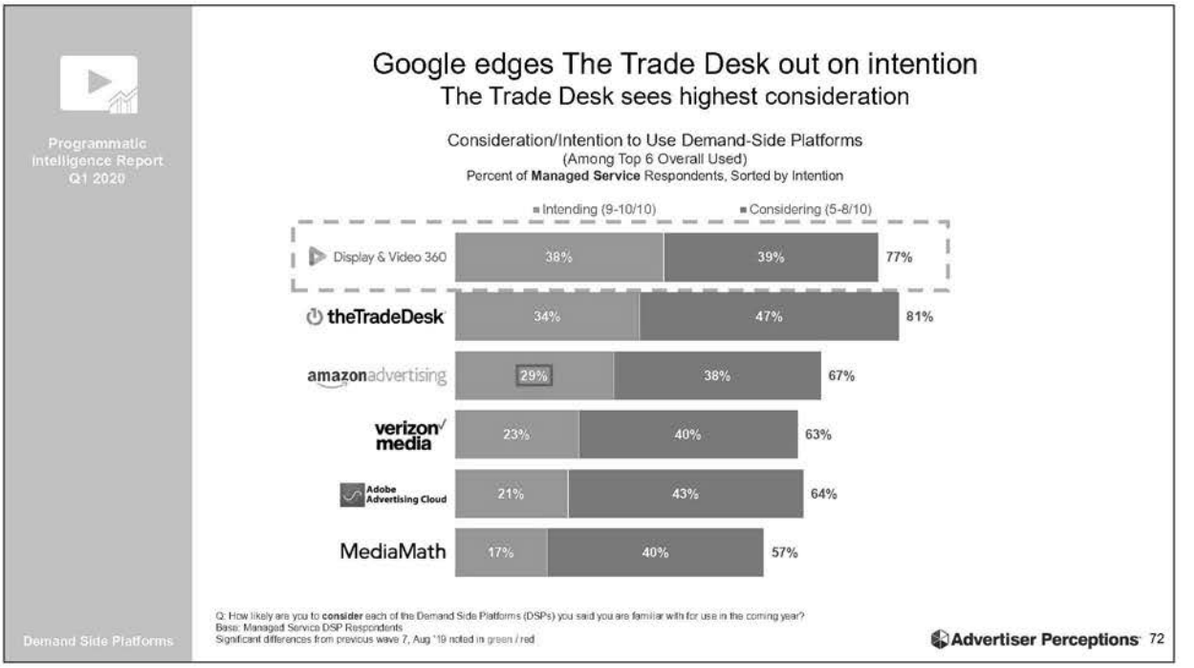
	DSP	Usage
1	amazonadvertising	32%
2	Display & Video 360	29%
3	Adobe Advertising Cloud	26%
4	theTradeDesk	25%
5	verizon media	19%
6	MediaMath	18%

Q: Which types of advertising are you using each Demand Side Platform (DSP) for?
Base: Using DSPs for "Media Type"
Significant differences from previous wave 7, Aug '19 noted in green / red

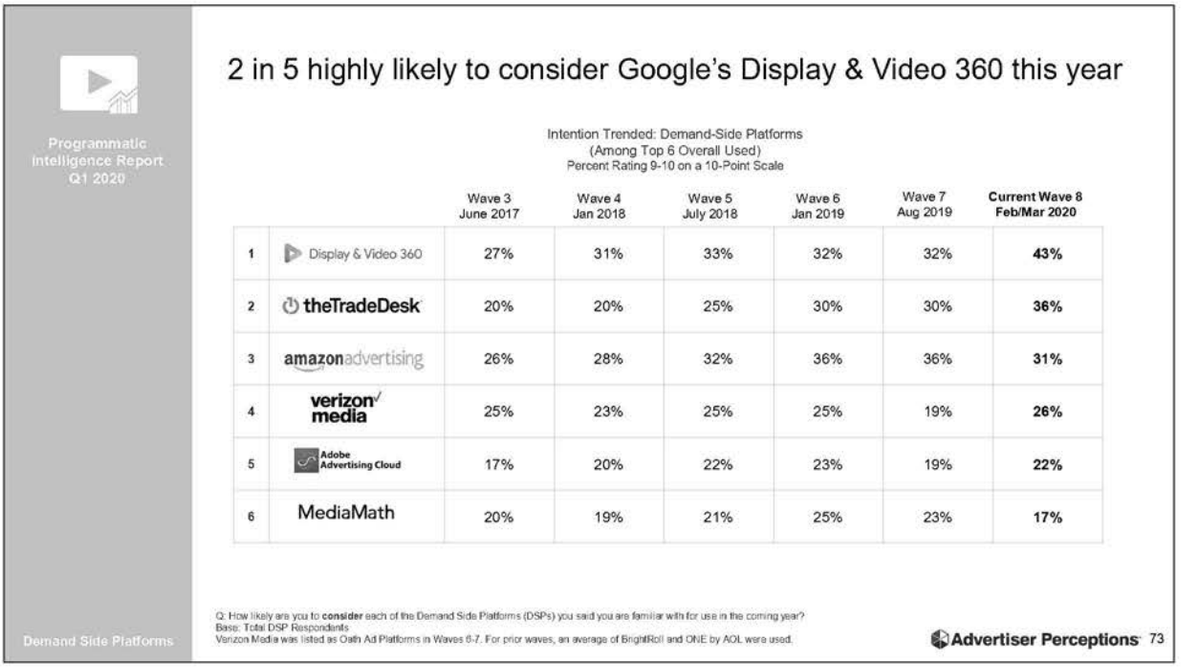
Demand Side Platforms

Advertiser Perceptions 71

Q232



Q220 Consideration/Intention



Programmatic Intelligence Report Q1 2020

2 in 5 highly likely to consider Google's Display & Video 360 this year

Intention Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 9-10 on a 10-Point Scale

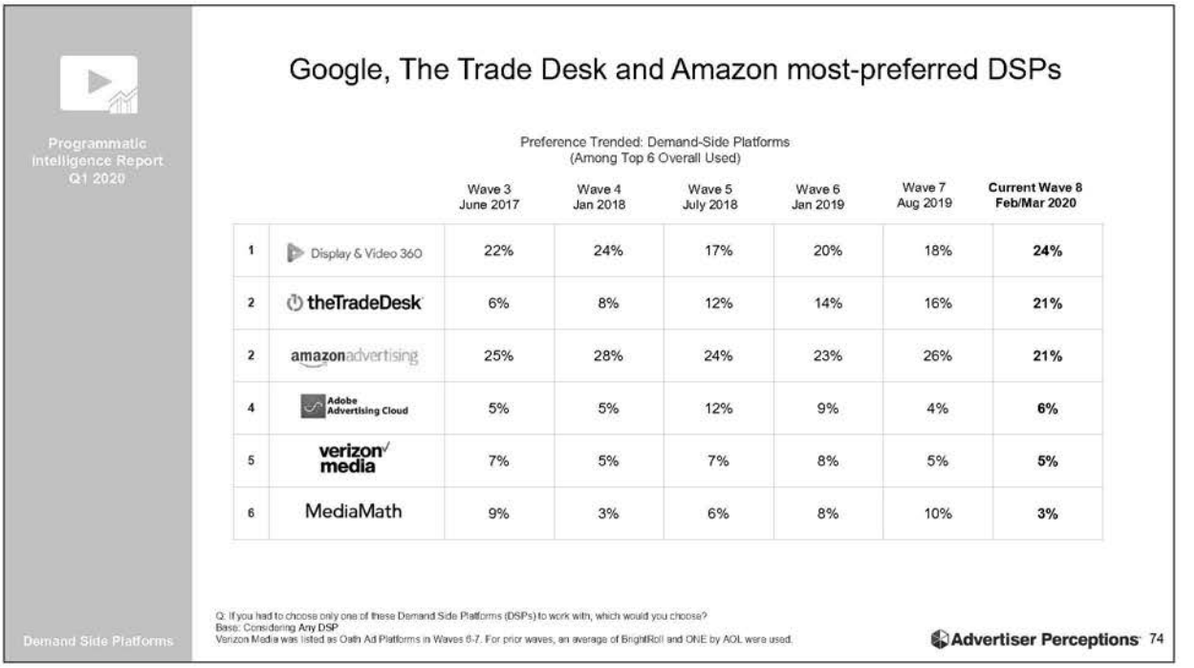
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	27%	31%	33%	32%	32%	**43%**
2	theTradeDesk	20%	20%	25%	30%	30%	**36%**
3	amazonadvertising	26%	28%	32%	36%	36%	**31%**
4	verizon media	25%	23%	25%	25%	19%	**26%**
5	Adobe Advertising Cloud	17%	20%	22%	23%	19%	**22%**
6	MediaMath	20%	19%	21%	25%	23%	**17%**

Q: How likely are you to **consider** each of the Demand Side Platforms (DSPs) you said you are familiar with for use in the coming year?
Base: Total DSP Respondents
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Demand Side Platforms

Advertiser Perceptions 73

Q220



Programmatic Intelligence Report Q1 2020

Google, The Trade Desk and Amazon most-preferred DSPs

Preference Trended: Demand-Side Platforms
(Among Top 6 Overall Used)

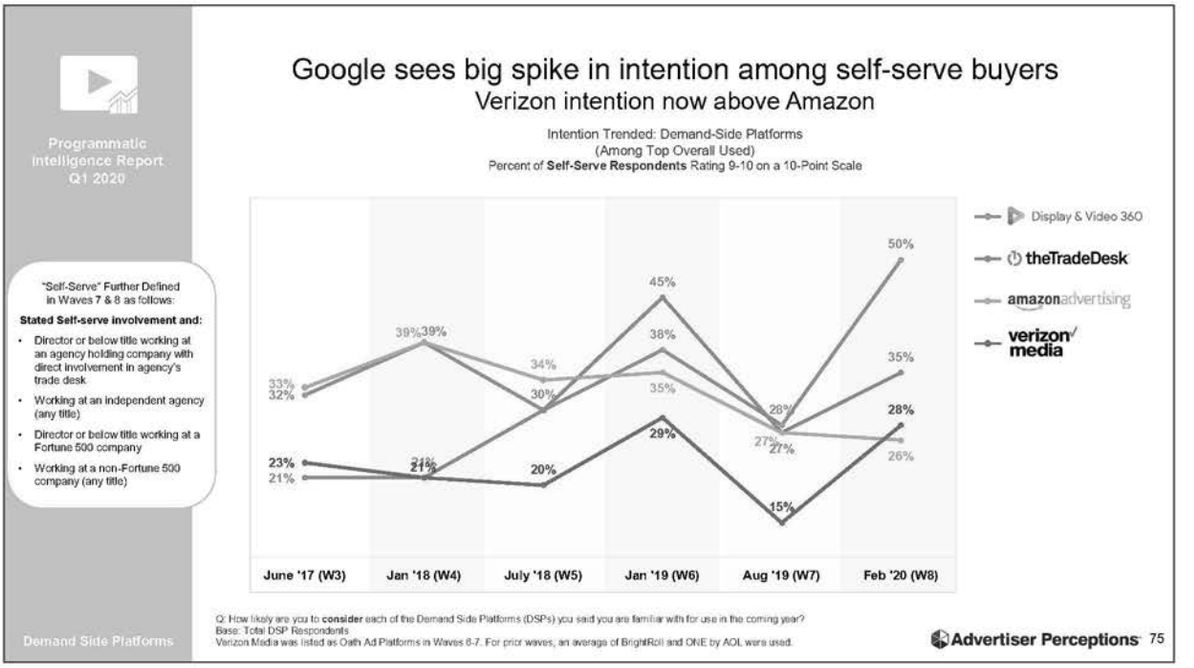
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	22%	24%	17%	20%	18%	**24%**
2	theTradeDesk	6%	8%	12%	14%	16%	**21%**
2	amazonadvertising	25%	28%	24%	23%	26%	**21%**
4	Adobe Advertising Cloud	5%	5%	12%	9%	4%	**6%**
5	verizon media	7%	5%	7%	8%	5%	**5%**
6	MediaMath	9%	3%	6%	8%	10%	**3%**

Q: If you had to choose only one of these Demand Side Platforms (DSPs) to work with, which would you choose?
Base: Considering Any DSP
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

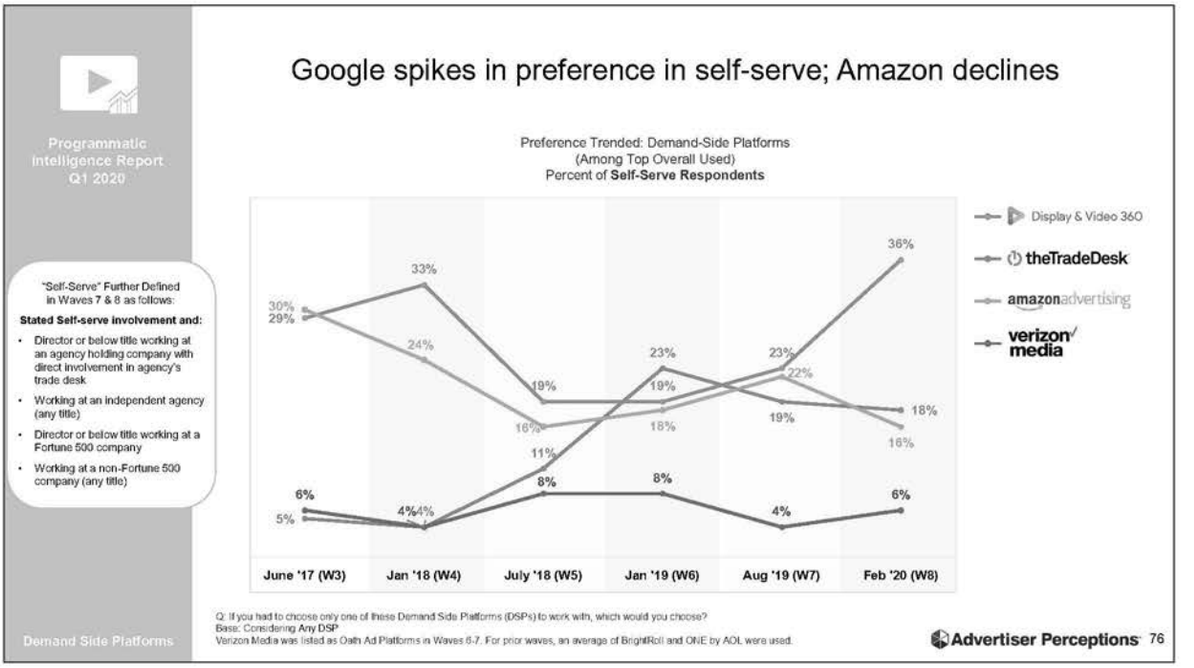
Demand Side Platforms

Advertiser Perceptions 74

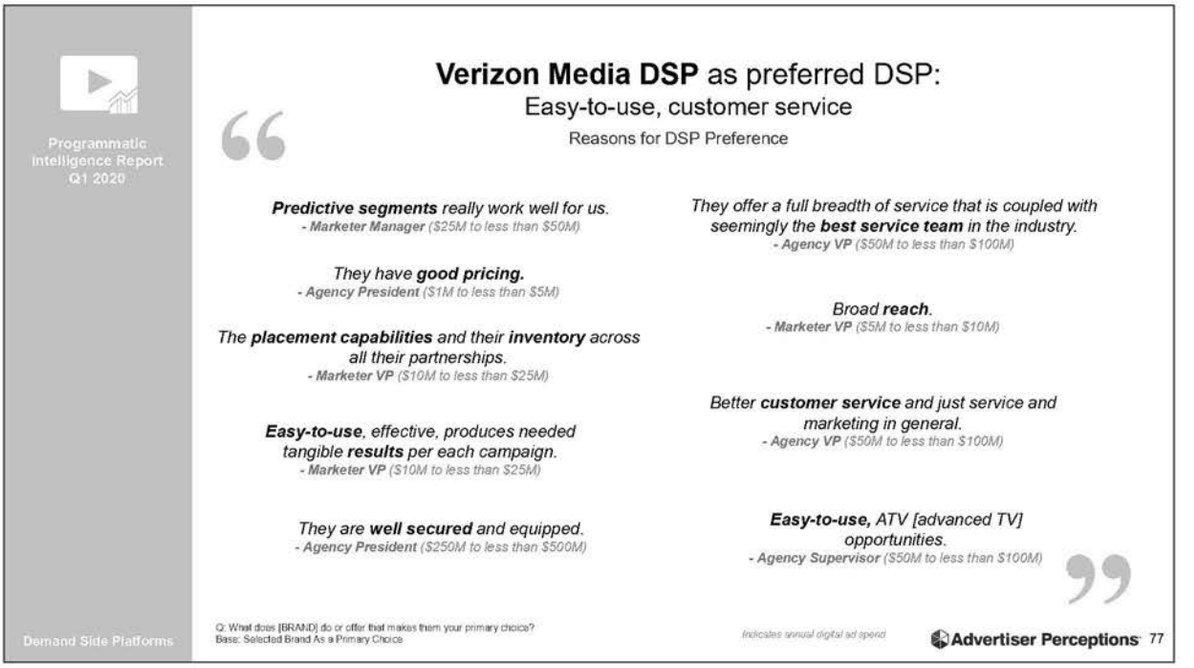
Q226 Preference
Note: "Considering any DSP" version in tables.


Programmatic Intelligence Report Q1 2020
Google sees big spike in intention among self-serve buyers
Verizon intention now above Amazon
Intention Trended: Demand-Side Platforms
(Among Top Overall Used)
Percent of Self-Serve Respondents Rating 9-10 on a 10-Point Scale
"Self-Serve" Further Defined in Waves 7 & 8 as follows:
Stated Self-serve involvement and:
Director or below title working at an agency holding company with direct involvement in agency's trade desk
Working at an independent agency (any title)
Director or below title working at a Fortune 500 company
Working at a non-Fortune 500 company (any title)
Display & Video 360
theTradeDesk
amazonadvertising
verizon media
33%
32%
39%
39%
34%
30%
45%
38%
35%
28%
50%
35%
28%
26%
23%
21%
21%
20%
29%
27%
21%
15%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Jan '19 (W6)
Aug '19 (W7)
Feb '20 (W8)
Q: How likely are you to consider each of the Demand Side Platforms (DSPs) you said you are familiar with for use in the coming year?
Base: Total DSP Respondents
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions
75

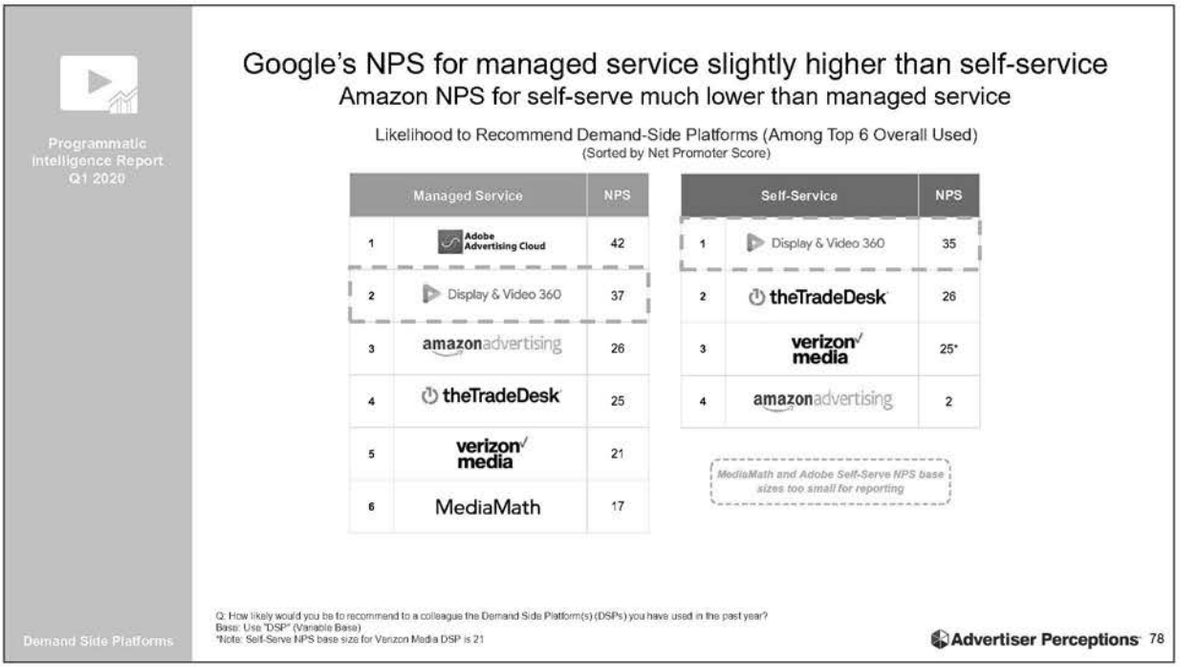
Q220


Programmatic Intelligence Report Q1 2020
Google spikes in preference in self-serve; Amazon declines
Preference Trended: Demand-Side Platforms
(Among Top Overall Used)
Percent of Self-Serve Respondents
"Self-Serve" Further Defined in Waves 7 & 8 as follows:
Stated Self-serve involvement and:
Director or below title working at an agency holding company with direct involvement in agency's trade desk
Working at an independent agency (any title)
Director or below title working at a Fortune 500 company
Working at a non-Fortune 500 company (any title)
Display & Video 360
theTradeDesk
amazonadvertising
verizon media
30%
29%
33%
24%
19%
16%
11%
23%
19%
18%
23%
22%
19%
36%
18%
16%
6%
5%
4%
4%
8%
8%
4%
6%
June '17 (W3)
Jan '18 (W4)
July '18 (W5)
Jan '19 (W6)
Aug '19 (W7)
Feb '20 (W8)
Q: If you had to choose only one of these Demand Side Platforms (DSPs) to work with, which would you choose?
Base: Considering Any DSP
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.
Demand Side Platforms
Advertiser Perceptions
76

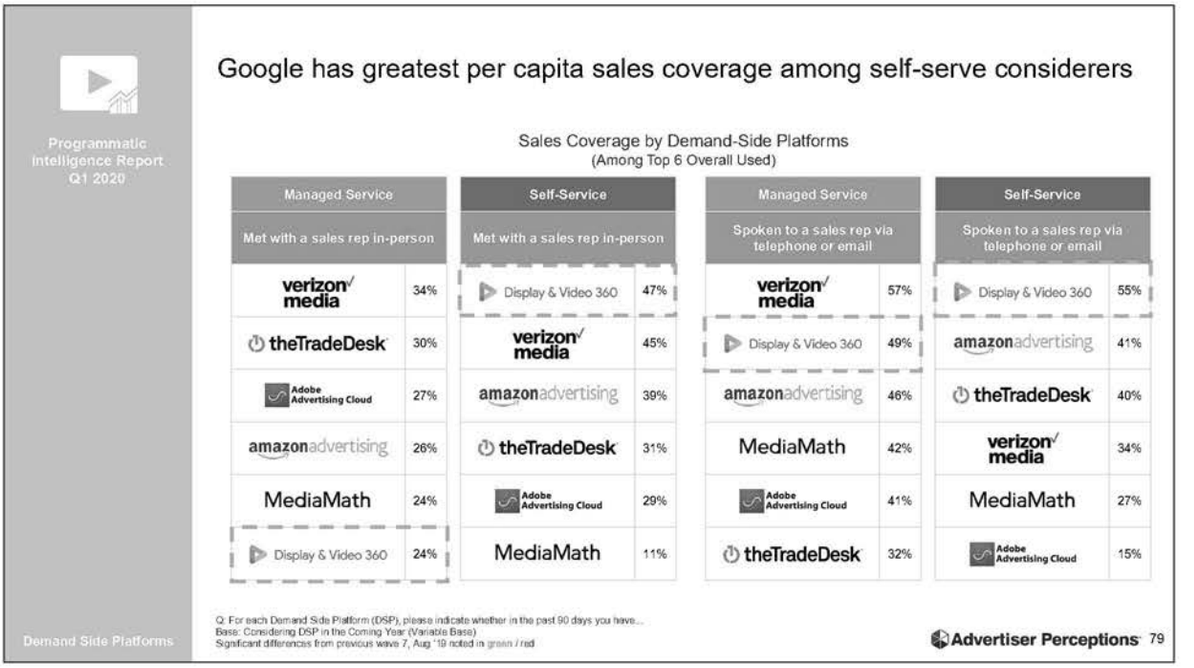
Q220


Programmatic Intelligence Report Q1 2020
Verizon Media DSP as preferred DSP:
Easy-to-use, customer service
Reasons for DSP Preference
Predictive segments really work well for us.
- Marketer Manager ($25M to less than $50M)
They have good pricing.
- Agency President ($1M to less than $5M)
The placement capabilities and their inventory across all their partnerships.
- Marketer VP ($10M to less than $25M)
Easy-to-use, effective, produces needed tangible results per each campaign.
- Marketer VP ($10M to less than $25M)
They are well secured and equipped.
- Agency President ($250M to less than $500M)
They offer a full breadth of service that is coupled with seemingly the best service team in the industry.
- Agency VP ($50M to less than $100M)
Broad reach.
- Marketer VP ($5M to less than $10M)
Better customer service and just service and marketing in general.
- Agency VP ($50M to less than $100M)
Easy-to-use, ATV [advanced TV] opportunities.
- Agency Supervisor ($50M to less than $100M)
Q: What does [BRAND] do or offer that makes them your primary choice?
Base: Selected Brand As a Primary Choice
Indicates annual digital ad spend
Demand Side Platforms
Advertiser Perceptions
77

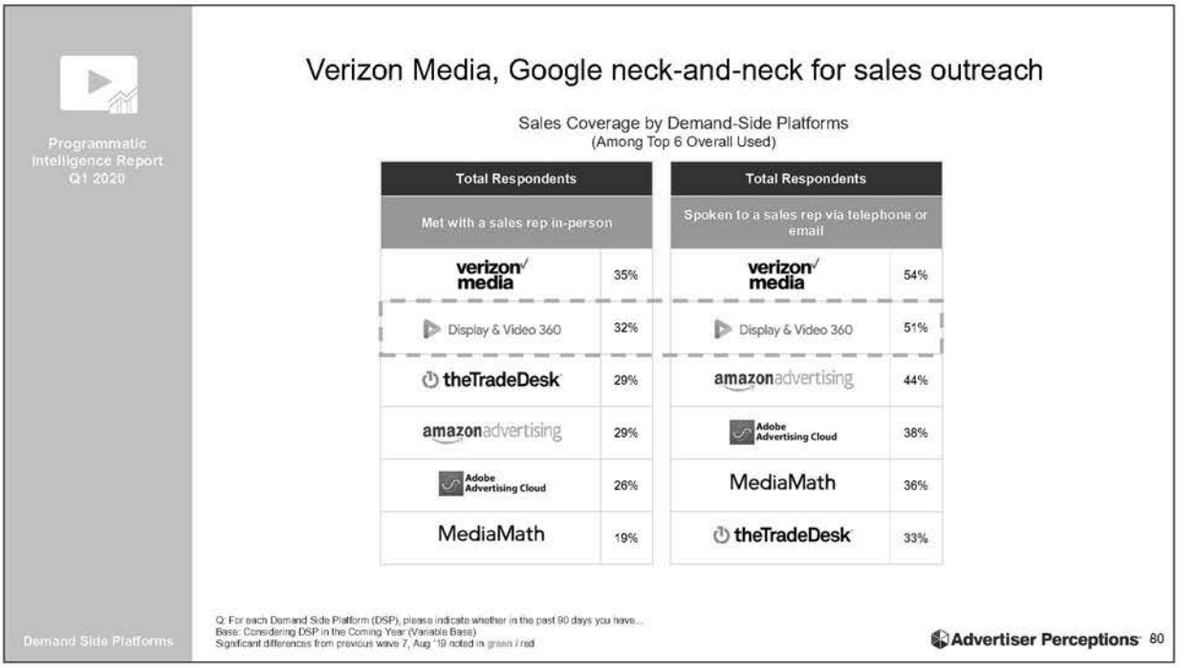
Q226a.


Programmatic Intelligence Report Q1 2020
Google's NPS for managed service slightly higher than self-service
Amazon NPS for self-serve much lower than managed service
Likelihood to Recommend Demand-Side Platforms (Among Top 6 Overall Used)
(Sorted by Net Promoter Score)
Managed Service NPS
1 Adobe Advertising Cloud 42
2 Display & Video 360 37
3 amazonadvertising 26
4 theTradeDesk 25
5 verizon media 21
6 MediaMath 17
Self-Service NPS
1 Display & Video 360 35
2 theTradeDesk 26
3 verizon media 25*
4 amazonadvertising 2
MediaMath and Adobe Self-Serve NPS base sizes too small for reporting
Q: How likely would you be to recommend to a colleague the Demand Side Platform(s) (DSPs) you have used in the past year?
Base: Use "DSP" (Variable Base)
*Note: Self-Serve NPS base size for Verizon Media DSP is 21
Demand Side Platforms
Advertiser Perceptions 78

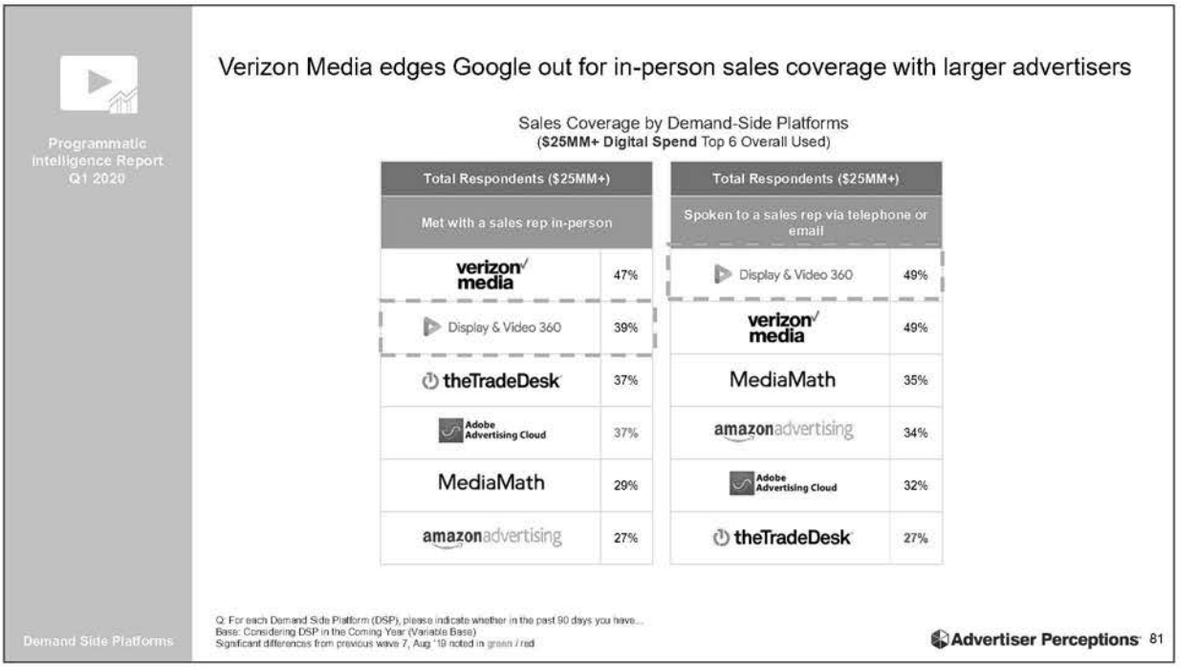
Q230 NPS



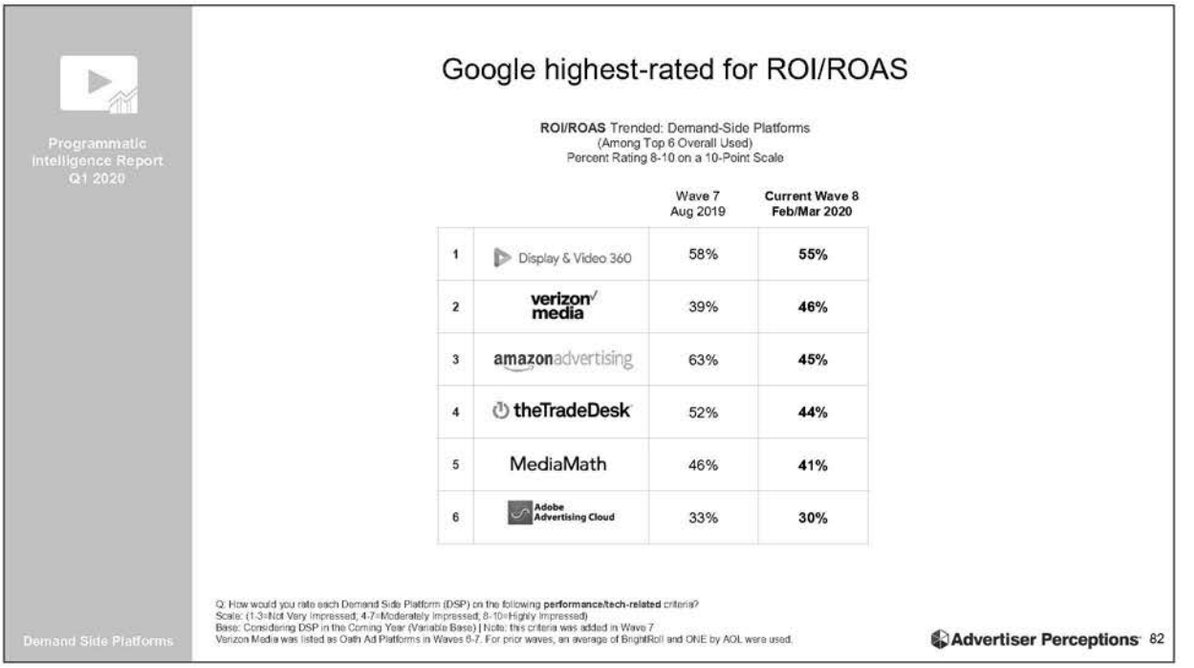
Q250 Sales coverage



Q250 Sales coverage



Q250 Sales coverage



Programmatic Intelligence Report Q1 2020

Google highest-rated for ROI/ROAS

ROI/ROAS Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

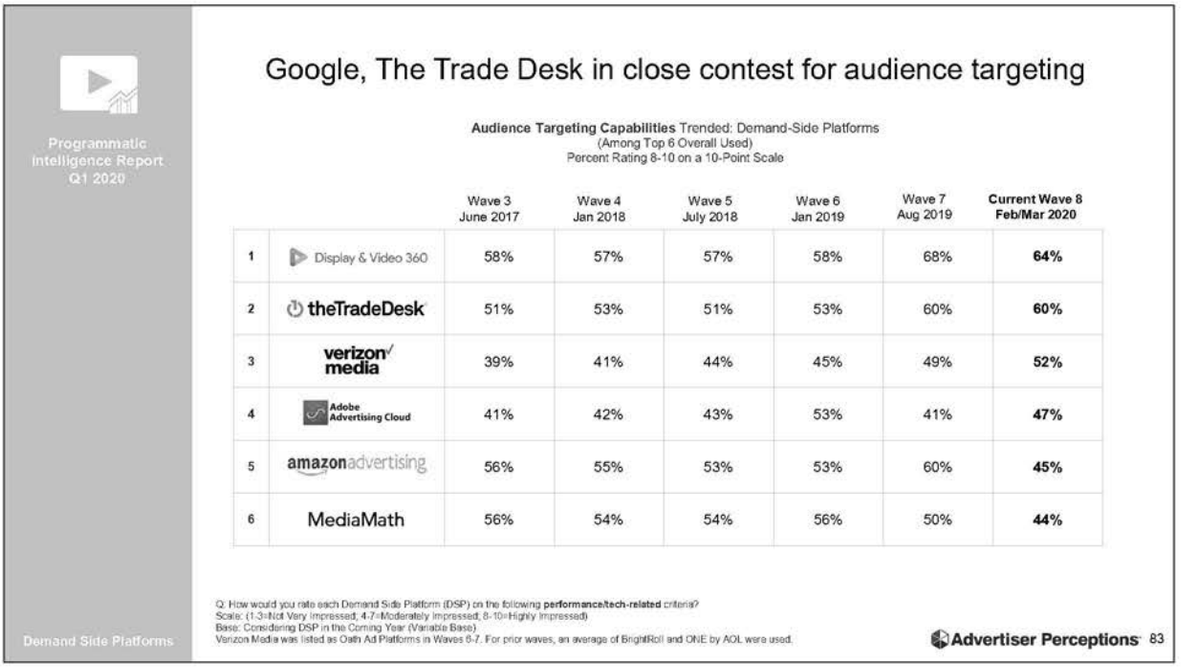
		Wave 7 Aug 2019	Current Wave 8 Feb/Mar 2020
1	Display & Video 360	58%	**55%**
2	verizon media	39%	**46%**
3	amazon advertising	63%	**45%**
4	theTradeDesk	52%	**44%**
5	MediaMath	46%	**41%**
6	Adobe Advertising Cloud	33%	**30%**

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base) | Note: this criteria was added in Wave 7
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Demand Side Platforms

Advertiser Perceptions 82

Q235



Programmatic Intelligence Report Q1 2020

Google, The Trade Desk in close contest for audience targeting

Audience Targeting Capabilities Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

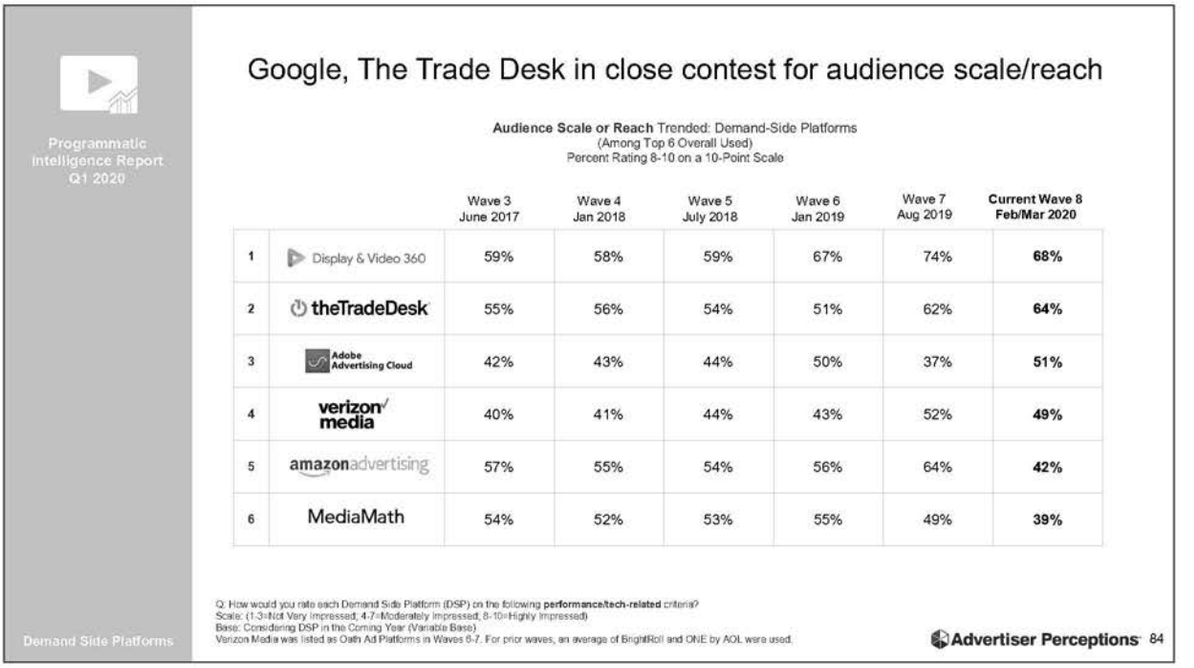
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	58%	57%	57%	58%	68%	**64%**
2	theTradeDesk	51%	53%	51%	53%	60%	**60%**
3	verizon media	39%	41%	44%	45%	49%	**52%**
4	Adobe Advertising Cloud	41%	42%	43%	53%	41%	**47%**
5	amazonadvertising	56%	55%	53%	53%	60%	**45%**
6	MediaMath	56%	54%	54%	56%	50%	**44%**

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Demand Side Platforms

Advertiser Perceptions 83

Q235



Programmatic Intelligence Report Q1 2020

Google, The Trade Desk in close contest for audience scale/reach

Audience Scale or Reach Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

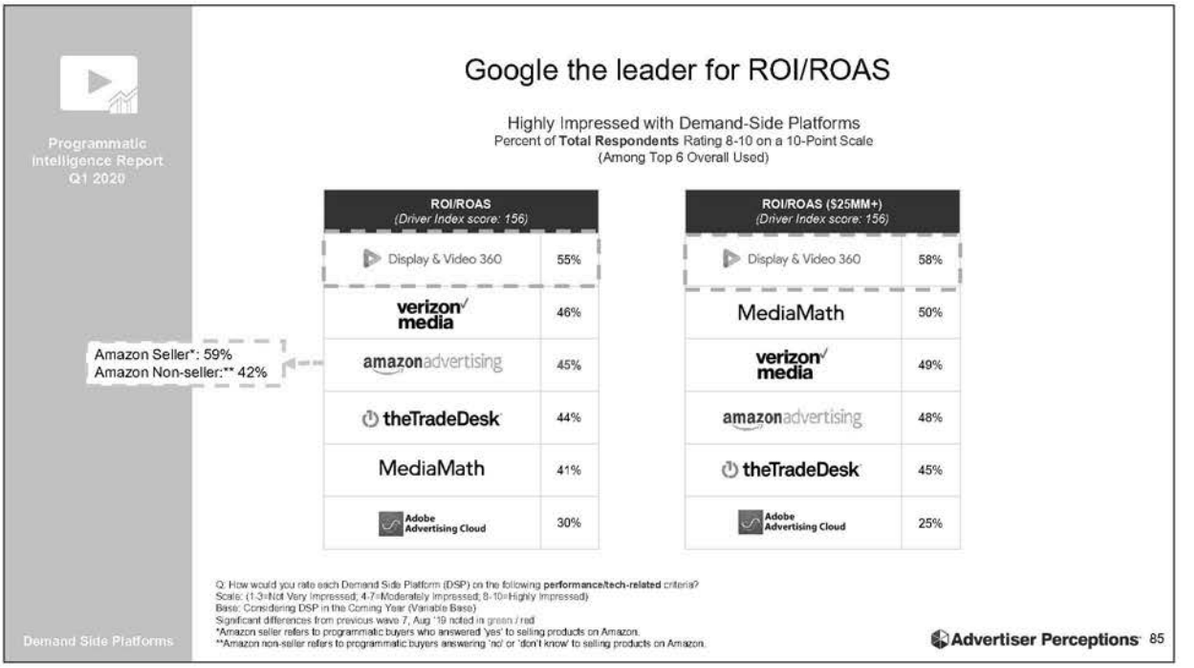
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	59%	58%	59%	67%	74%	**68%**
2	theTradeDesk	55%	56%	54%	51%	62%	**64%**
3	Adobe Advertising Cloud	42%	43%	44%	50%	37%	**51%**
4	verizon media	40%	41%	44%	43%	52%	**49%**
5	amazonadvertising	57%	55%	54%	56%	64%	**42%**
6	MediaMath	54%	52%	53%	55%	49%	**39%**

Q: How would you rate each Demand Side Platform (DSP) on the following **performance/tech-related** criteria?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

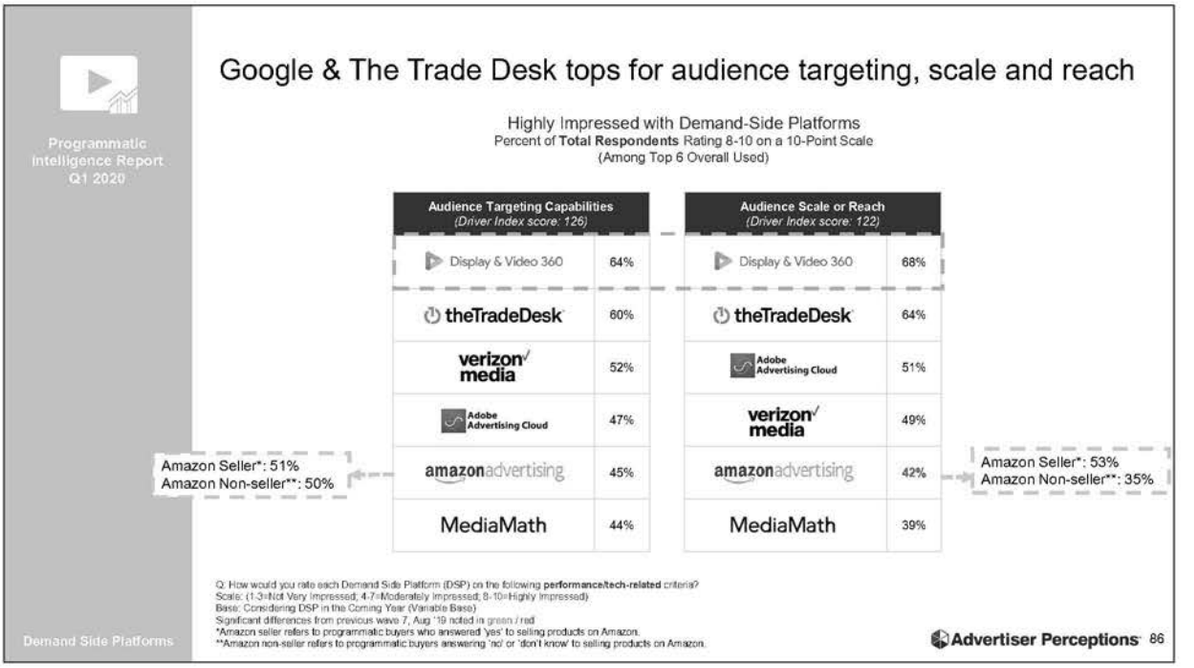
Advertiser Perceptions 84

Demand Side Platforms

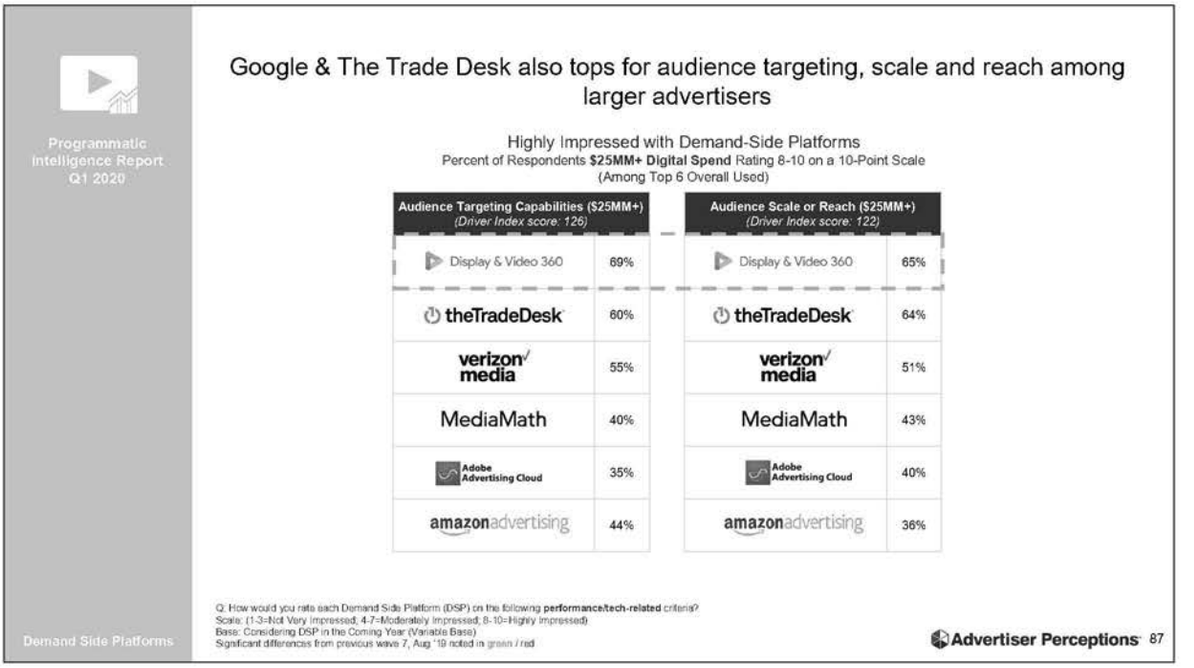
Q235



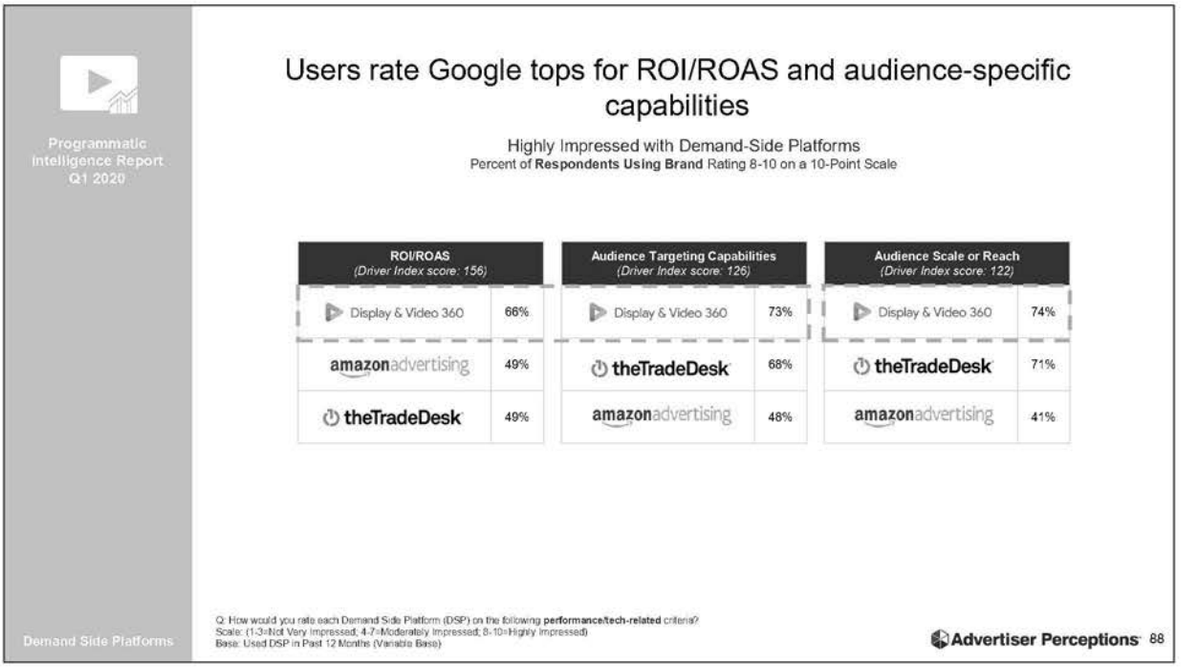
Q235 Performance ratings



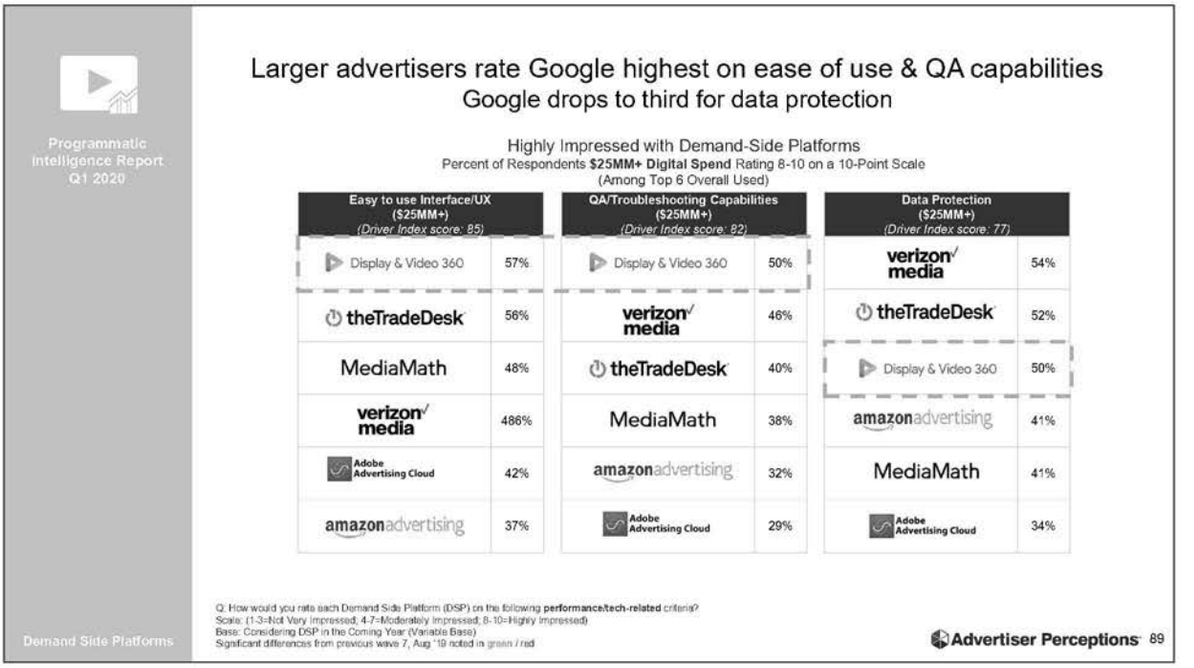
Q235 Performance ratings
Audience Targeting Capabilities (seller vs. non-seller): the Seller/Non-seller %s here for Amazon account for 73 of their 92 raters. These overall ratings are based on Consideration, but the Seller/Non-seller raters are based on those who sell products/services primarily online.



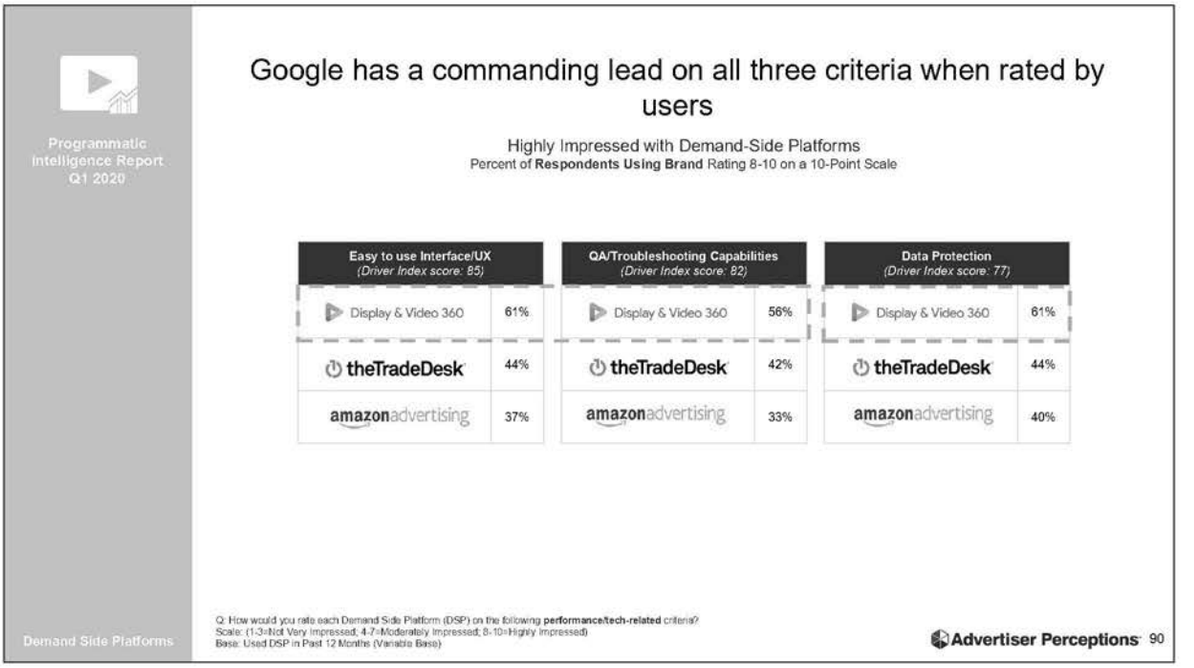
Q235 Performance ratings



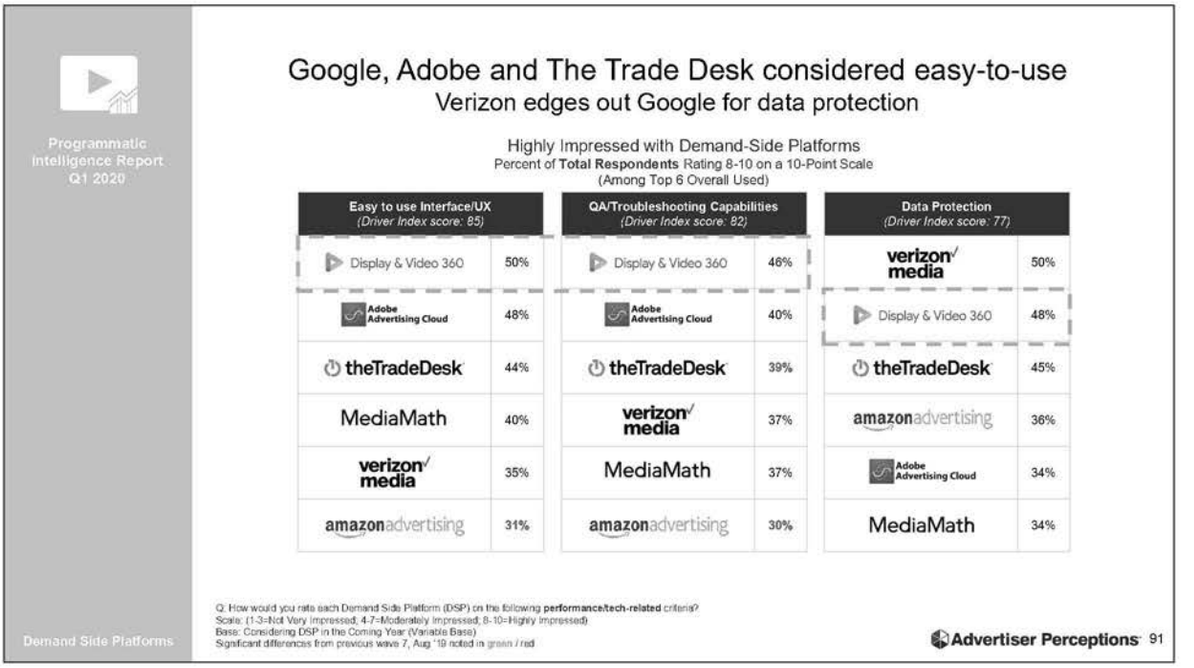
Q235 Performance ratings



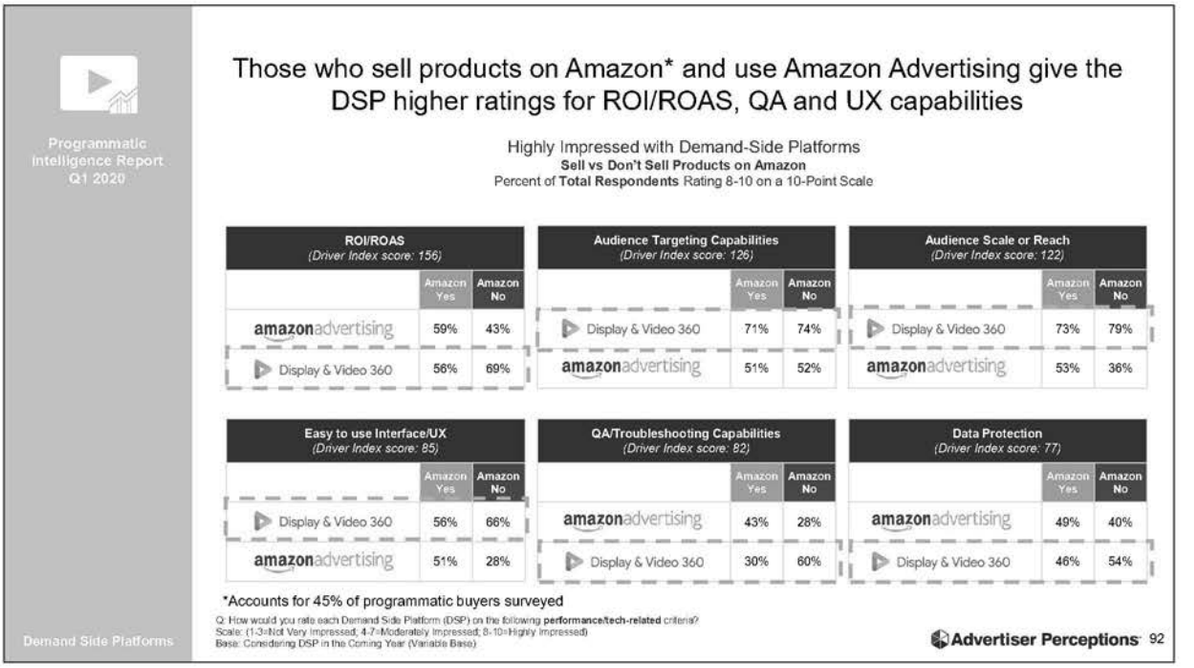
Q235 Performance ratings



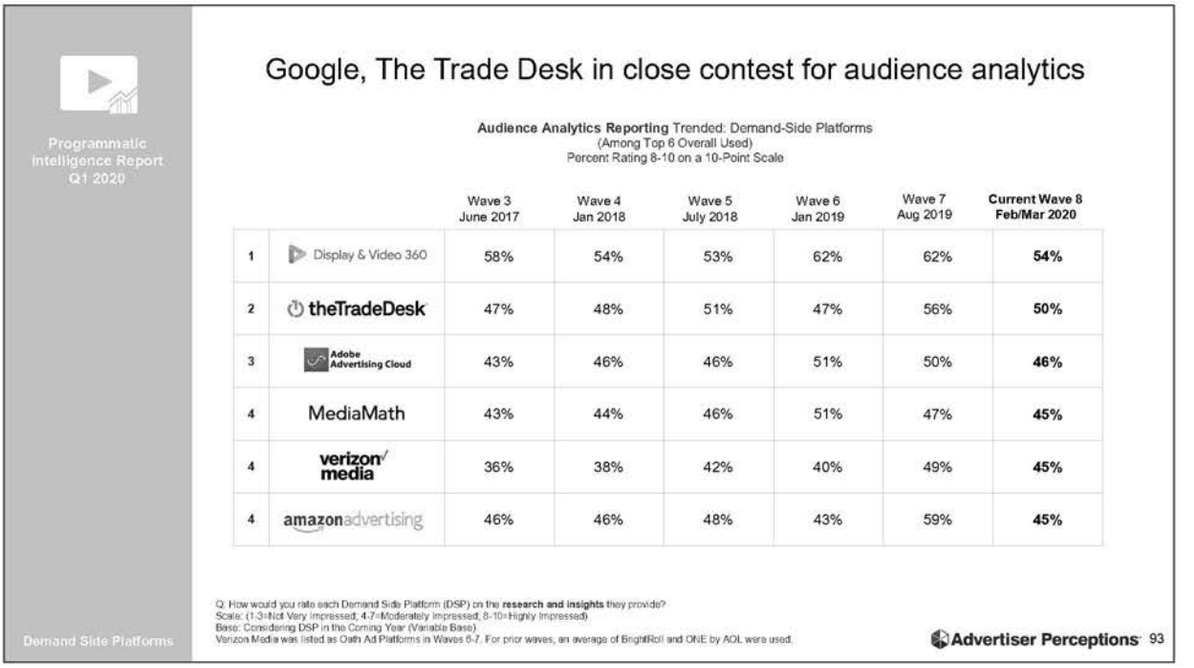
Q235 Performance ratings



Q235 Performance ratings



Q235 Performance ratings



Programmatic Intelligence Report Q1 2020

Google, The Trade Desk in close contest for audience analytics

Audience Analytics Reporting Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

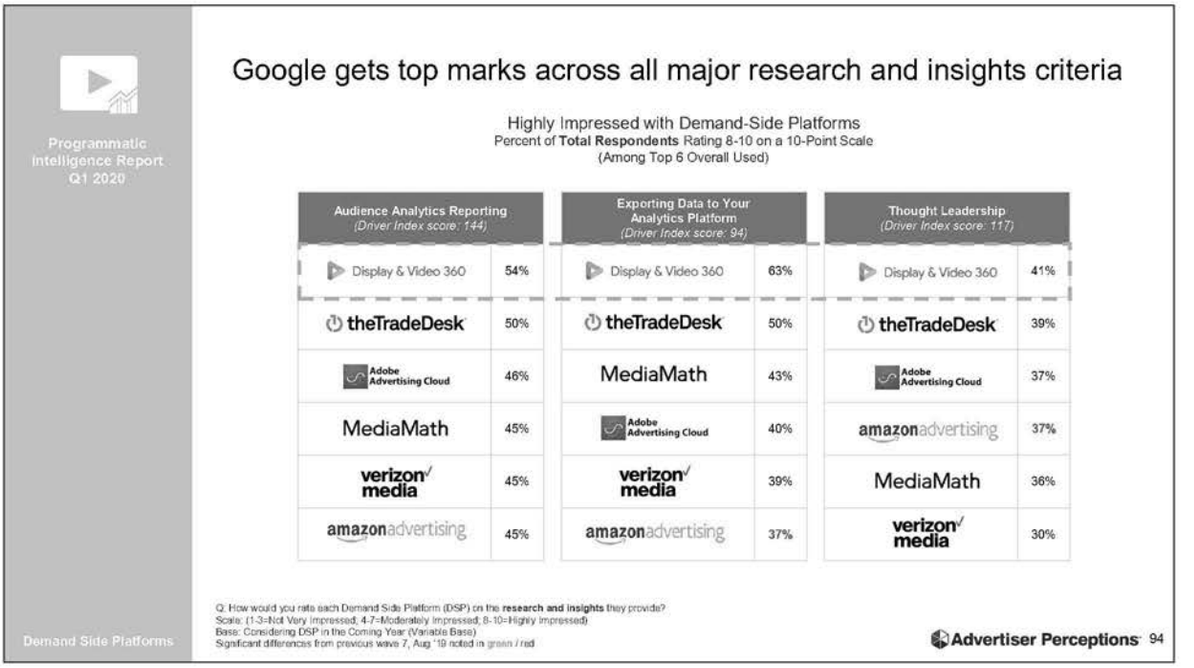
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	58%	54%	53%	62%	62%	**54%**
2	theTradeDesk	47%	48%	51%	47%	56%	**50%**
3	Adobe Advertising Cloud	43%	46%	46%	51%	50%	**46%**
4	MediaMath	43%	44%	46%	51%	47%	**45%**
4	verizon media	36%	38%	42%	40%	49%	**45%**
4	amazonadvertising	46%	46%	48%	43%	59%	**45%**

Q: How would you rate each Demand Side Platform (DSP) on the **research and insights** they provide?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

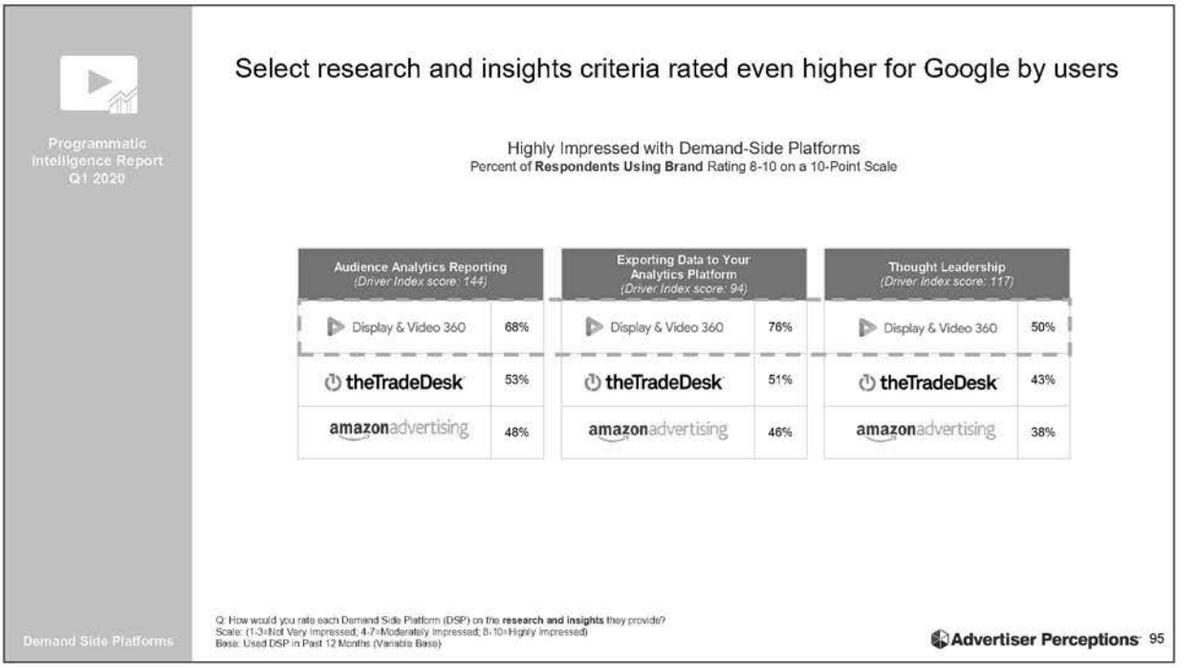
Demand Side Platforms

Advertiser Perceptions 93

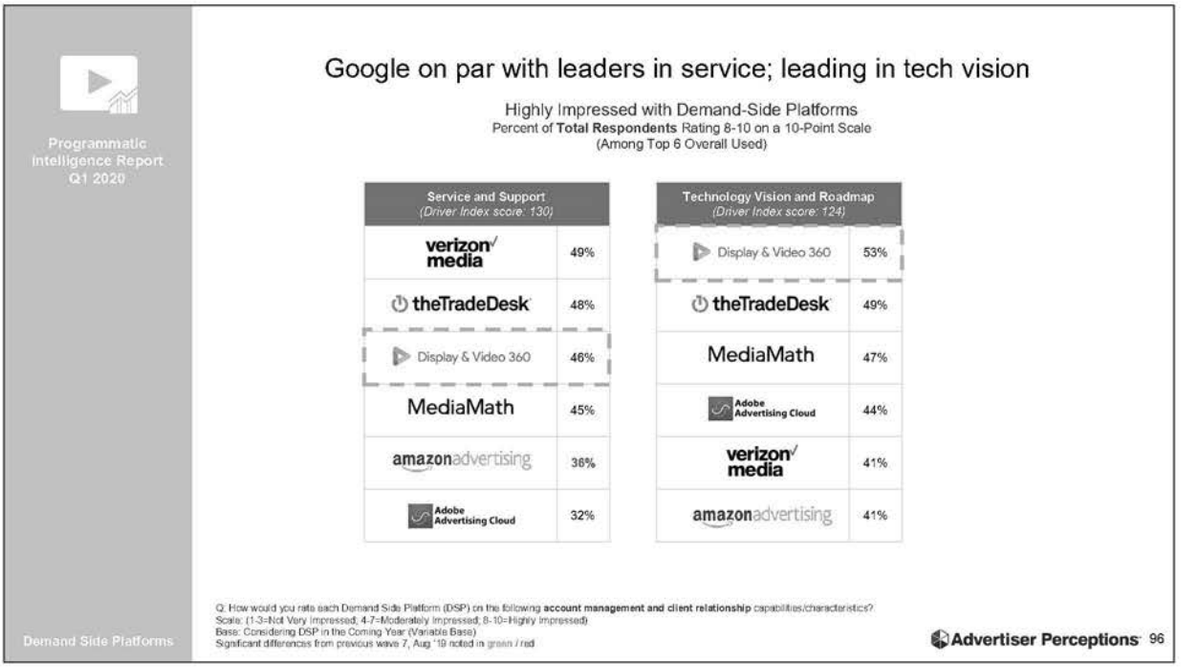
Q240



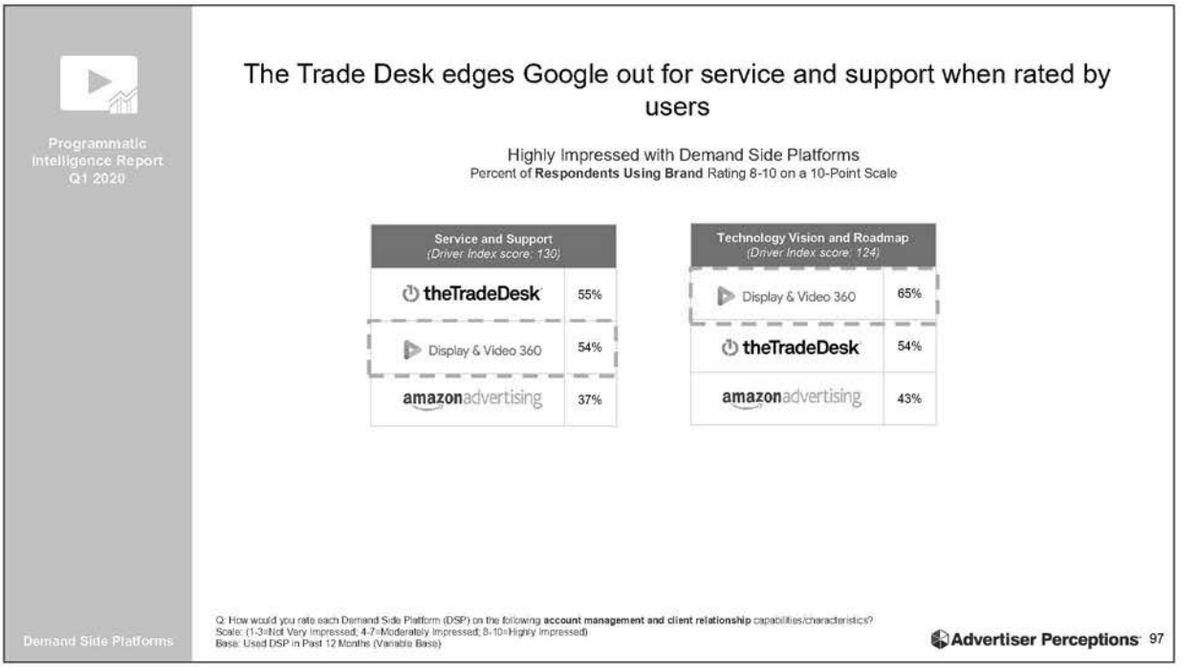
Q240 Research and insights ratings



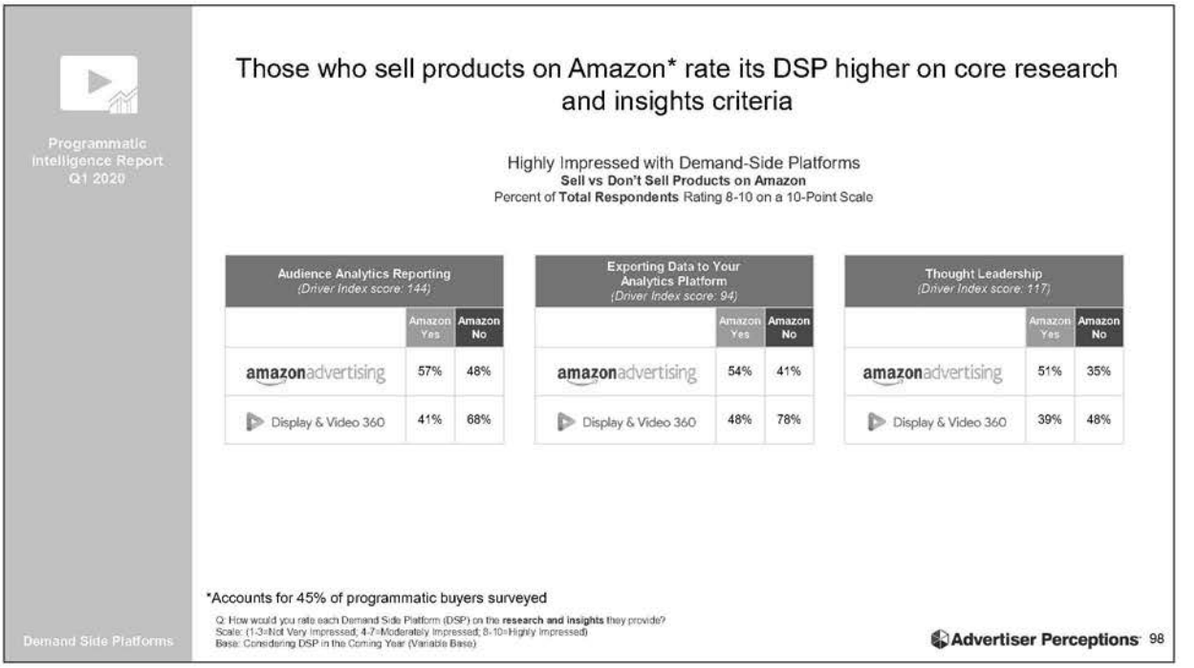
Q240 Research and insights ratings



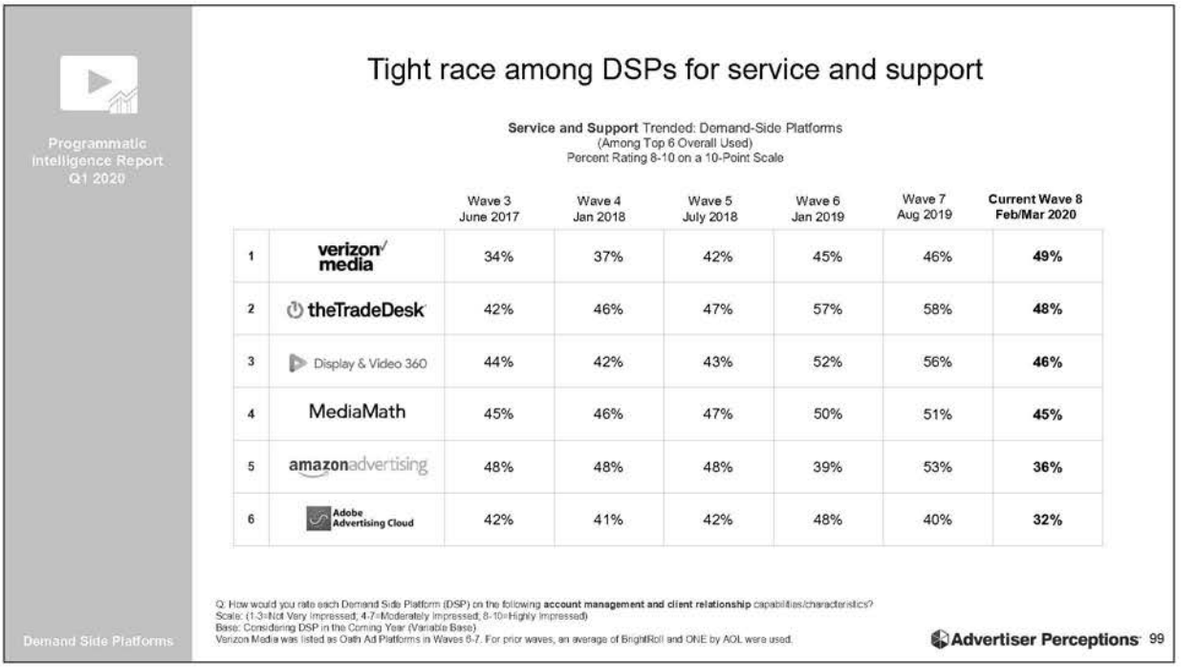
Q245 Relationship ratings



Q245 Relationship ratings



Q240 Research and insights ratings



Programmatic Intelligence Report Q1 2020

Tight race among DSPs for service and support

Service and Support Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

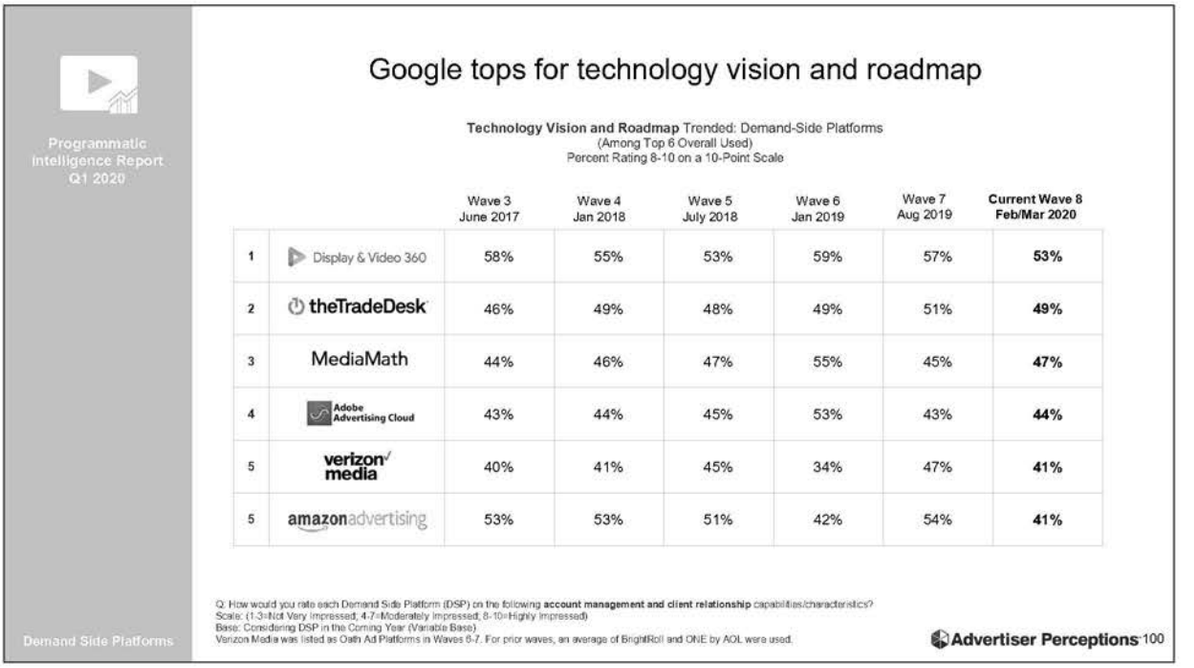
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	verizon media	34%	37%	42%	45%	46%	**49%**
2	theTradeDesk	42%	46%	47%	57%	58%	**48%**
3	Display & Video 360	44%	42%	43%	52%	56%	**46%**
4	MediaMath	45%	46%	47%	50%	51%	**45%**
5	amazonadvertising	48%	48%	48%	39%	53%	**36%**
6	Adobe Advertising Cloud	42%	41%	42%	48%	40%	**32%**

Q: How would you rate each Demand Side Platform (DSP) on the following **account management and client relationship** capabilities/characteristics?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Demand Side Platforms

Advertiser Perceptions 99

Q245



Programmatic Intelligence Report Q1 2020

Google tops for technology vision and roadmap

Technology Vision and Roadmap Trended: Demand-Side Platforms
(Among Top 6 Overall Used)
Percent Rating 8-10 on a 10-Point Scale

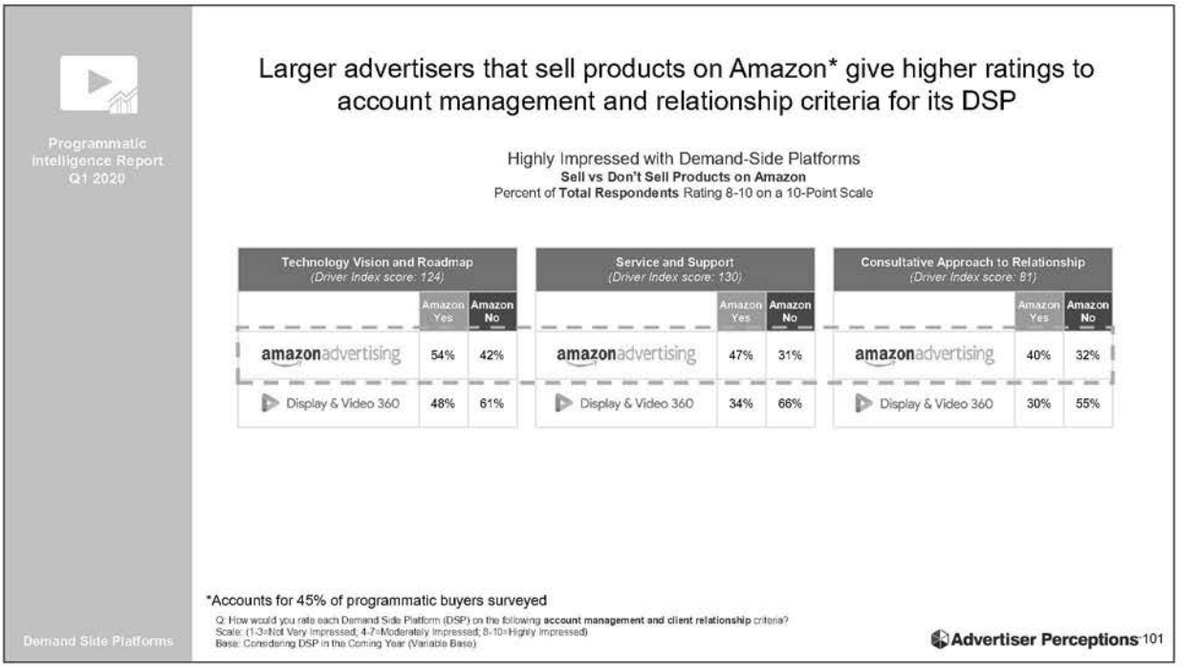
		Wave 3 June 2017	Wave 4 Jan 2018	Wave 5 July 2018	Wave 6 Jan 2019	Wave 7 Aug 2019	**Current Wave 8 Feb/Mar 2020**
1	Display & Video 360	58%	55%	53%	59%	57%	**53%**
2	theTradeDesk	46%	49%	48%	49%	51%	**49%**
3	MediaMath	44%	46%	47%	55%	45%	**47%**
4	Adobe Advertising Cloud	43%	44%	45%	53%	43%	**44%**
5	verizon media	40%	41%	45%	34%	47%	**41%**
5	amazon advertising	53%	53%	51%	42%	54%	**41%**

Q: How would you rate each Demand Side Platform (DSP) on the following **account management and client relationship** capabilities/characteristics?
Scale: (1-3=Not Very Impressed; 4-7=Moderately Impressed; 8-10=Highly Impressed)
Base: Considering DSP in the Coming Year (Variable Base)
Verizon Media was listed as Oath Ad Platforms in Waves 6-7. For prior waves, an average of BrightRoll and ONE by AOL were used.

Advertiser Perceptions 100

Demand Side Platforms

Q245



Q235 Performance ratings